Workforce One User Manual

Jobs and Training Programs

January 2015

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INTRODUCTION

Purpose

Greater Twin Cities United Way (GTCUW) unites caring people to build pathways out of poverty, creating opportunity for all. We work in three major areas—Stabilizing Families, Helping Children Succeed, and Empowering Healthy Lives.. One of our goals in the area of Stabilizing Families is to increase the annual earnings of 30,000 individuals, who live at or below 200% of the federal poverty line, by an average of $5,000. Our primary strategy to reach this goal is to provide grant funding for area Jobs and Training programs.

Measuring Impact

GTCUW evaluates jobs and training programs by how well they achieve the specified outcome: *Low income adults increase annual earnings through training, placement, and 12-month retention.*

To measure and improve the impact of GTCUW jobs and training programs, we collect and analyze both state level data and data provided by our grantees. In 2010, we partnered with the Governor's Workforce Development Council to develop a methodology that measures the return on public and philanthropic investment (ROI). This methodology compares the total cost of the program to its total benefits:

$$\text{ROI} = \frac{\text{Total Benefit}}{\text{Total Cost}} \quad \frac{(\text{Increased Wages + Taxes Paid + Incarceration Avoidance + Public Assistance Avoidance})}{(\text{Program Cost + Tax Payer Investment + Charitable Investment})}$$

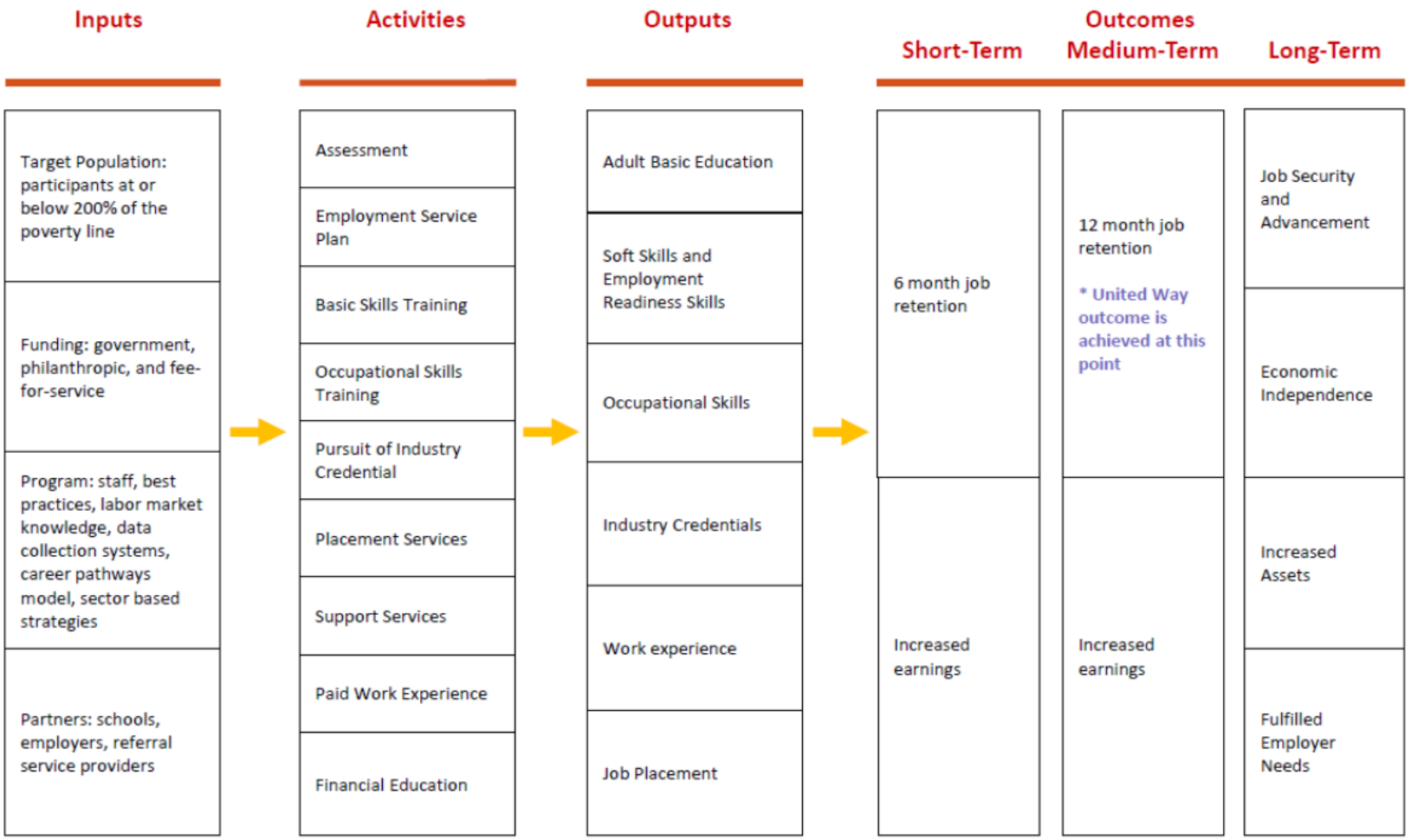
Workforce One will be used for three purposes: 1) to help collect data for annual reporting purposes, 2) to support reporting needs of our grant-funded agencies, and 3) to support our grantees' work by analyzing the return they get on each dollar invested in their programs. Workforce One (WF1) is the database we use to collect and manage participant data for all GTCUW funded Jobs and Training programs. Data entered into WF1 helps capture the benefits that job training programs create for participants and the savings created for state government. In addition, we will use data collected by the MN Department of Human Services, the MN Department of Employment and Economic Development, and the MN Department of Corrections.

Logic Model

GTCUW believes in funding high impact programs that use best practices and produce successful outcomes. The following page includes a logic model, or a visual representation of how a program is intended to produce particular results, for our Jobs and Training strategy. It includes program inputs, the activities that we consider as best practices, program outputs, and short, medium and long-term outcomes. GTCUW officially recognizes program success when a participant completes training, obtains employment, and reaches 12 months of job retention.

United Way
Greater Twin Cities United Way

LOGIC MODEL: INCREASED EARNINGS - JOBS AND TRAINING AREA



*** United Way Jobs and Training Outcome:** Low income adults increase annual earnings through employment training, placement and 12-month retention.

Snapshot of Essential Data

In addition to data fields required in WF1 by default (marked by asterisks), United Way requires additional data that is essential to our annual reporting and Return on Investment (ROI) analysis. This page should be used as a quick reference to the data that United Way requires program staff to enter into WF1.

WF1 Section	Data Needed	Page #
Enrollment	**Response Options**	
Family Status	not a family member, other family member, parent in one parent family, parent in a two parent family	15
Labor Force Status	employed full-time, employed part time, received term notice/military separation, not employed, etc.	15-16
Disability Status	not disabled, disabled with employment barrier, disabled without employment barrier	16
Limited English Language Proficiency	yes/no	16
Veteran Status	yes/no	16
TANF/MFIP Recipient	yes/no	16
Refugee Assistance Recipient	yes/no	16
General Assistance Recipient	yes/no	16
Food Support Recipient	yes/no	16
Actual Family Size	blank field	16
Annual Family Income	blank field	16
UI Benefit Status	eligible – not claimant, eligible – claimant, exhaustee, ineligible, etc.	16-17
Homeless	yes/no	17
Offender Status	yes/no	17
Person Has Given Consent to Obtain Wage Detail	yes/no	17
Activities	**Required Data Fields**	
12-Month Retention Service (key outcome)	Start date	32
6-Month Retention Service (key outcome)	Start date	31-32
Assessment/Testing	Start date	27-28
Basic Skills Training	Start date	28-29
Financial Education Services	Start date	34
Individual Plan Development	Start date	28
Job Placement	Start date	30-31
Occupational Skills Training	Start date	29-30

Support Services	Start date	33
Paid Work Experience	Start date, Employer Name, State, Employer Industry (NAICS), Occupation Title (O*NET), Job Sector, Job Duration, Job Start Date, Hourly Wage, Hours per Week	33-34
Placement Services	Start date	30
Closing a Record		
Exit Reason	Completed program objective, returned to school, withdrew, other	36
Exit	Primary Exit Reason, Exit Date, Labor Force Status, Completion Results, Select Employer	37

Client Participation

Data protection and privacy is very important to GTCUW. We use individual-level data in evaluation for two purposes: 1) for annual reporting and 2) for ROI analysis. If your agency receives funding for workforce/job training programs through GTCUW, **the grant contract requires that you enter information about all clients into the WF1 system for annual reporting.** Separately, agencies must seek clients' consent to participate in the ROI analysis (by providing their wage detail) through the use of a consent form. Participants may choose to opt out of the ROI analysis by not signing your agency's consent form. A template Consent to Release Information form can be found in the Appendix of this manual; before using this form, we recommend that your organization's legal counsel be consulted.

Signed consent forms must be maintained at Grantee sites and made available in the event of an audit. See page 17 for instructions about marking the wage detail consent check box in WF1.

Requesting Access to Workforce One (WF1)

WF1 is managed by the MN Department of Employment and Economic Development (DEED). Grantee agencies must submit signed forms to DEED in order to gain access. WF1 offers several levels of access to participant information. To have access to WF1, you must submit both of the following forms to DEED after reading the Access Request Form Instructions (directions for submission can be found using the link).

Supervisors and Each staff person (Employment Counselors, Data Specialists, and Administrative Assistants) should submit: User Access Request Form.

Getting into the WF1 System

To pull WF1 up on your computer, open an internet browser (WF1 is only supported by Internet Explorer) and type in the following web link: https://www.mnworkforceone.com.

To access WF1, you must log in with your DEED-provided username and password.

Contacts

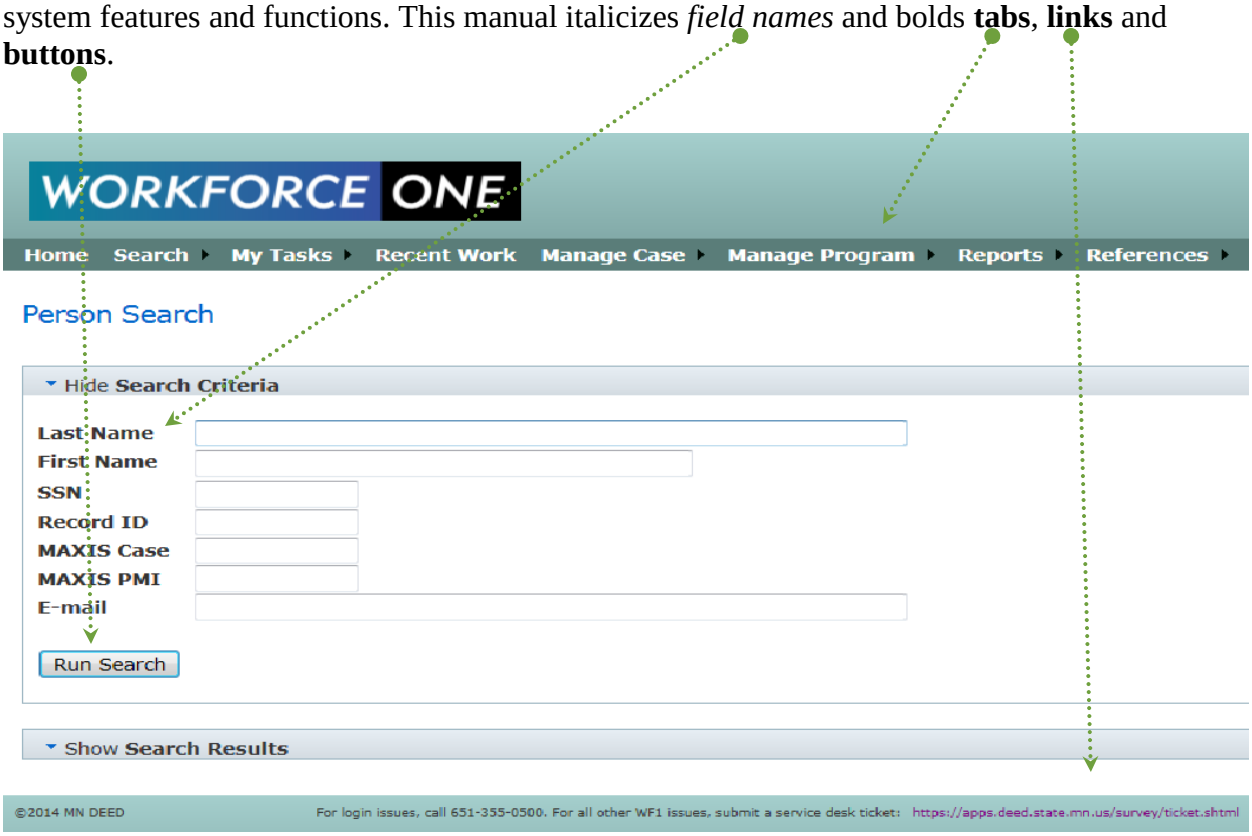
For technical issues and questions related to the use of WF1, submit a Service Desk Ticket, or contact the DEED Service Desk at 651-355-0500.

For program and policy guidance, contact the following staff people at the Greater Twin Cities United Way:

Daniel Jay – (612) 340-7682
Rachel Speck – (612)-340-7651
WF1Help@unitedwaytwincities.org

User Tips

Readers should have a Workforce One account and basic-training on logging-in and navigating system features and functions. This manual italicizes *field names* and bolds **tabs**, **links** and **buttons**.



1. The *age* field is automatically calculated from the date-of-birth field.
2. Enter all dates in the format: MM/DD/YYYY
3. Enter the decimal and two decimal places for dollar amounts, but no comma or dollar sign: 5000.00, not $5,000.
4. Use links at the top of each page to navigate through the WF1 system (e.g. to go back to home page of WF1, click on the "Home" link at the bottom of the page).
5. You must have the appropriate access rights to view another program's data, such as Minnesota Family Investment Program (MFIP).
6. WF1 accepts upper or lower case entries, so capitalize proper names.
7. Though the United Way does not require you input participant information into fields not marked by an asterisk (*), you are still welcome to enter this information, for it may be useful in the future.
8. Be careful not to accidently change a drop-down list selection if the cursor\pointer is located on the field when highlighted blue. Moving the mouse wheel can change the selection. Move your cursor away from the drop-down box after choosing an answer.

NEW CLIENT ENTRY

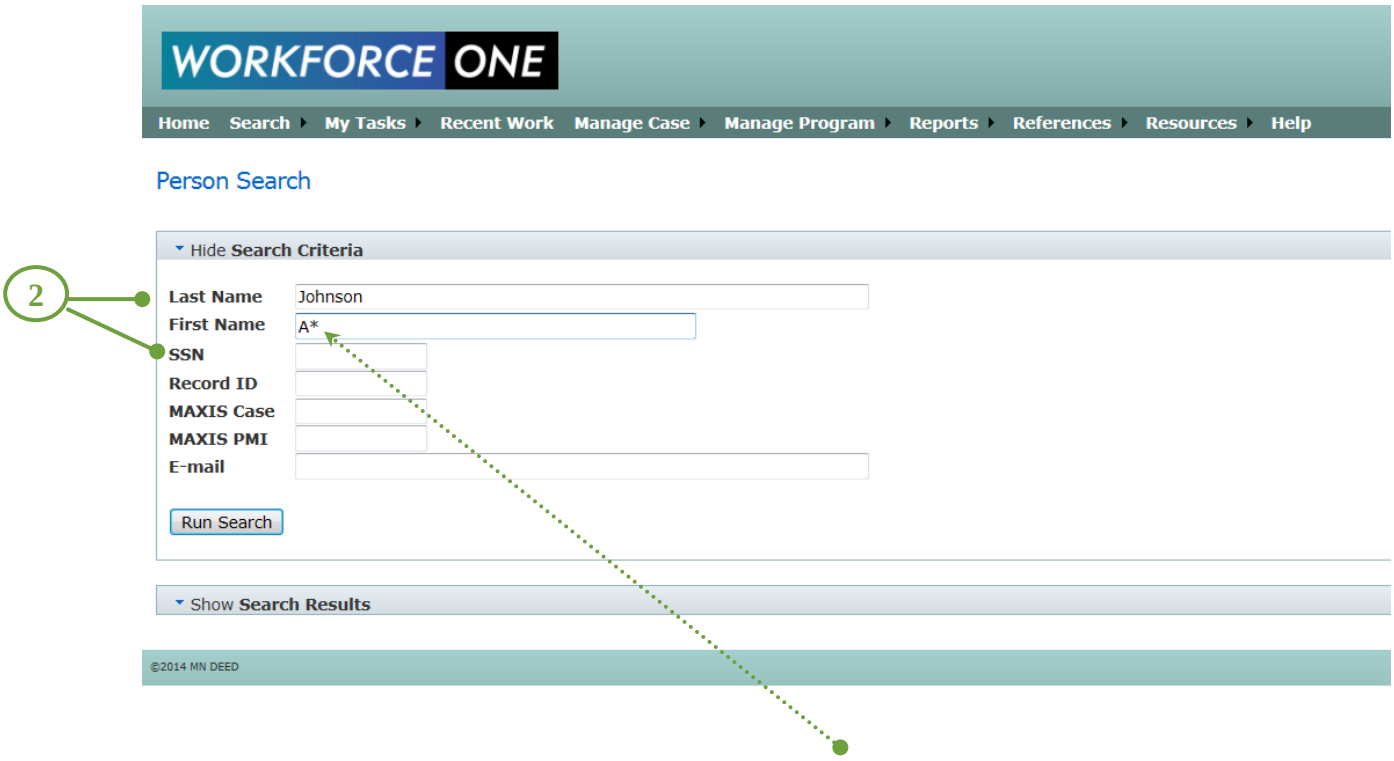
Search for an Existing Record in WF1

A potential client may already have a record in WF1 because they participated in another program that uses WF1 for reporting purposes. You must search for an existing record before adding a new one.

1. After logging in, hover your mouse if **Search**, and click on **Person**.

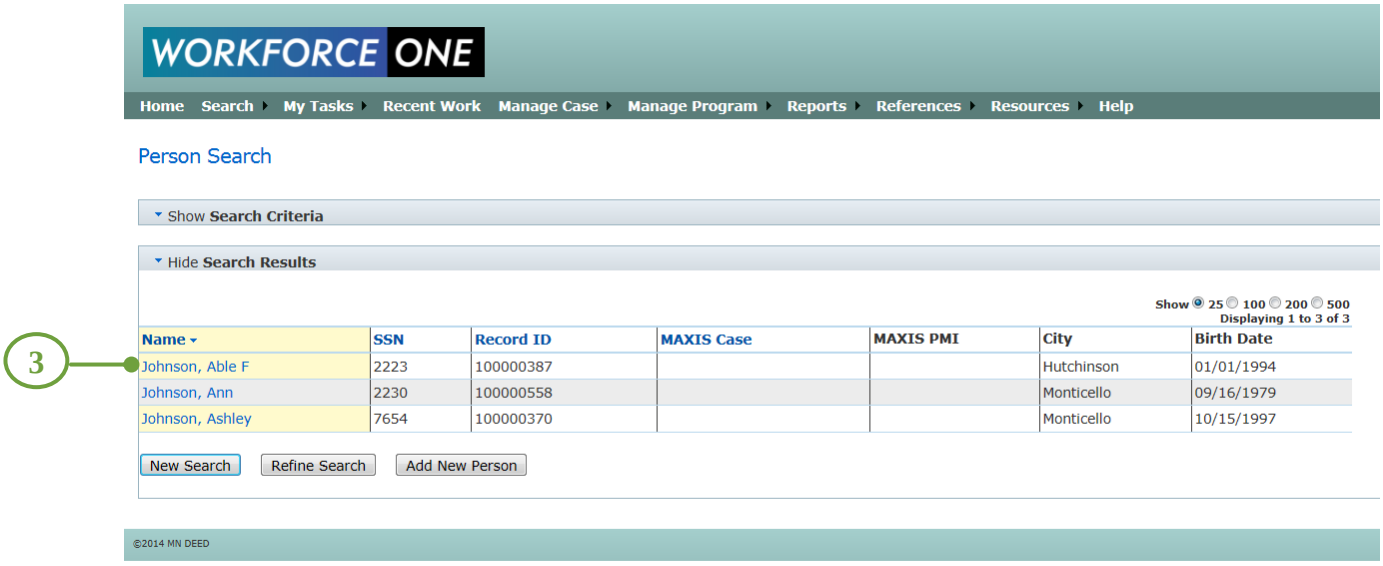
2. Enter your client's last name or Social Security Number (SSN) to determine if he or she is in WF1. This search prevents duplicate records and saves data entry time. Click **Search**.[1]

[1] User tip: If the search returns no record, search on last name instead of SSN or leave the first name field blank.

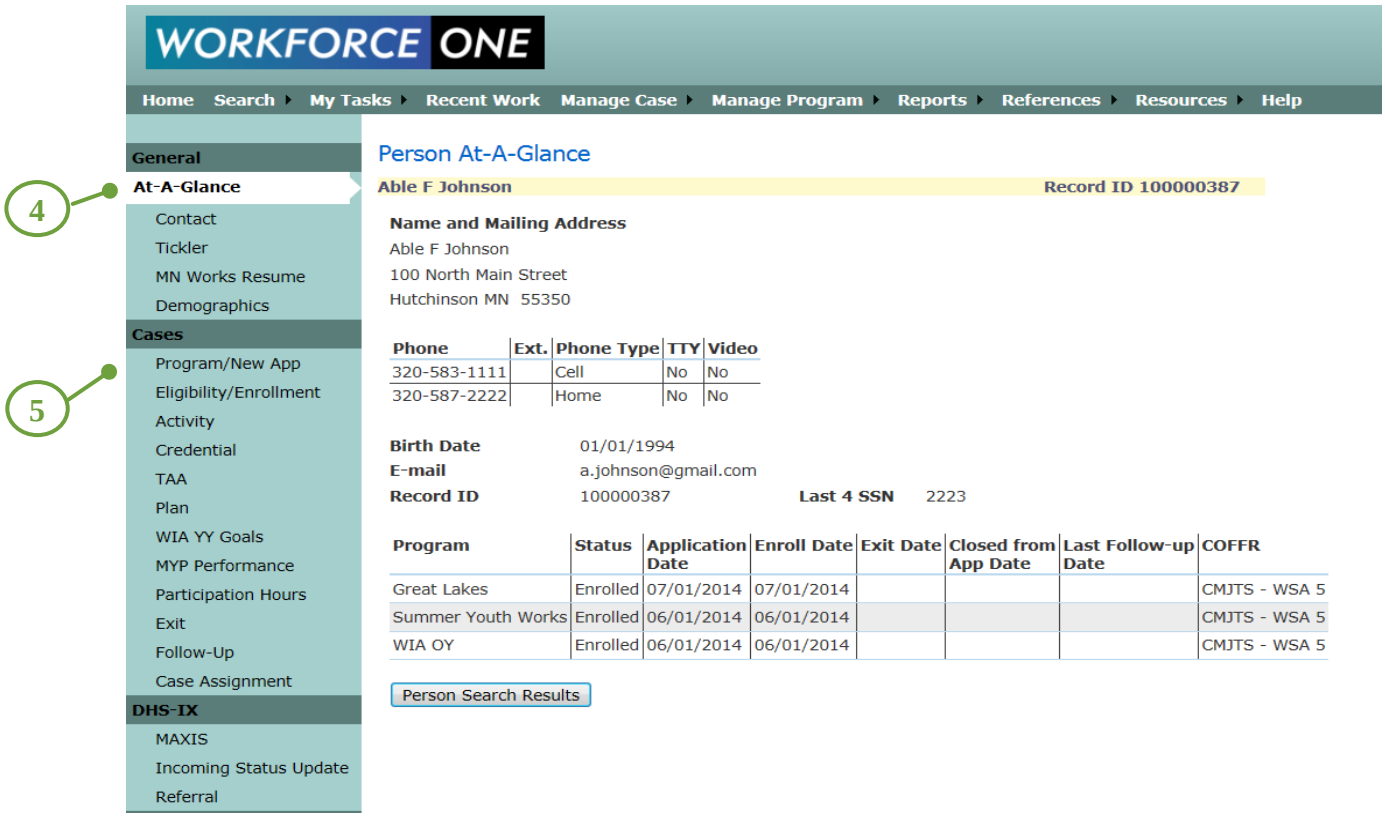


! For common last names, enter the person's first initial with an * to narrow the search results.

3. Click on your client's **name**. Last-name searches return all records matching the last name and first initial (if used), while a SSN search returns one matching record.


WORKFORCE ONE
Home Search My Tasks Recent Work Manage Case Manage Program Reports References Resources Help
Person Search
Show Search Criteria
Hide Search Results
Show 25 100 200 500
Displaying 1 to 3 of 3
3
Name SSN Record ID MAXIS Case MAXIS PMI City Birth Date
Johnson, Able F 2223 100000387 Hutchinson 01/01/1994
Johnson, Ann 2230 100000558 Monticello 09/16/1979
Johnson, Ashley 7654 100000370 Monticello 10/15/1997
New Search
Refine Search
Add New Person
©2014 MN DEED

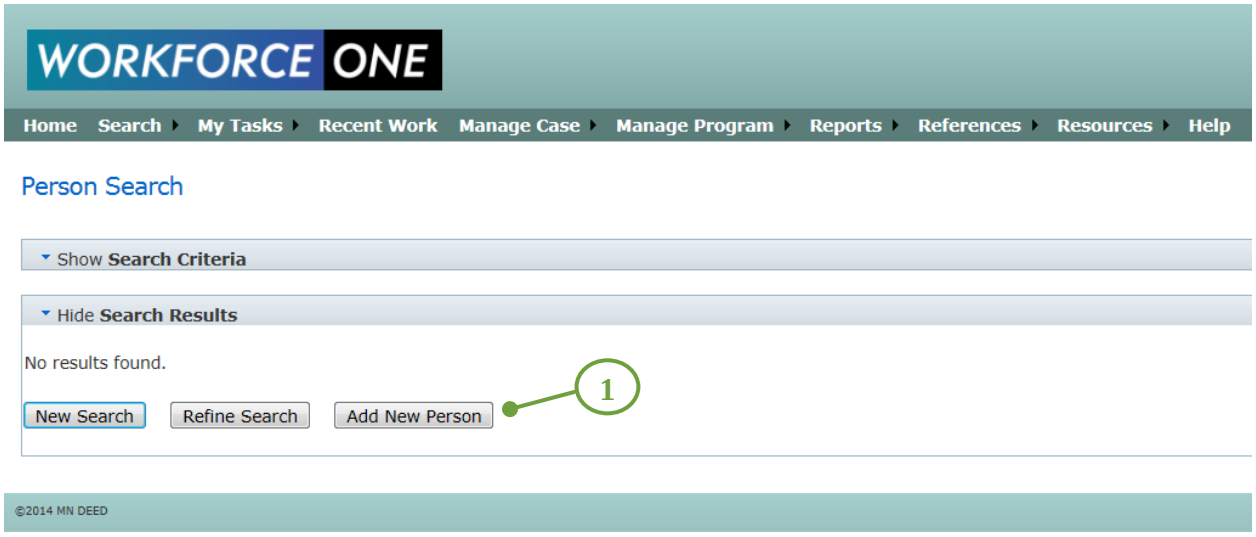
4. Double check the **General > At-A-Glance** screen to ensure that your client's contact and demographic information is correct.



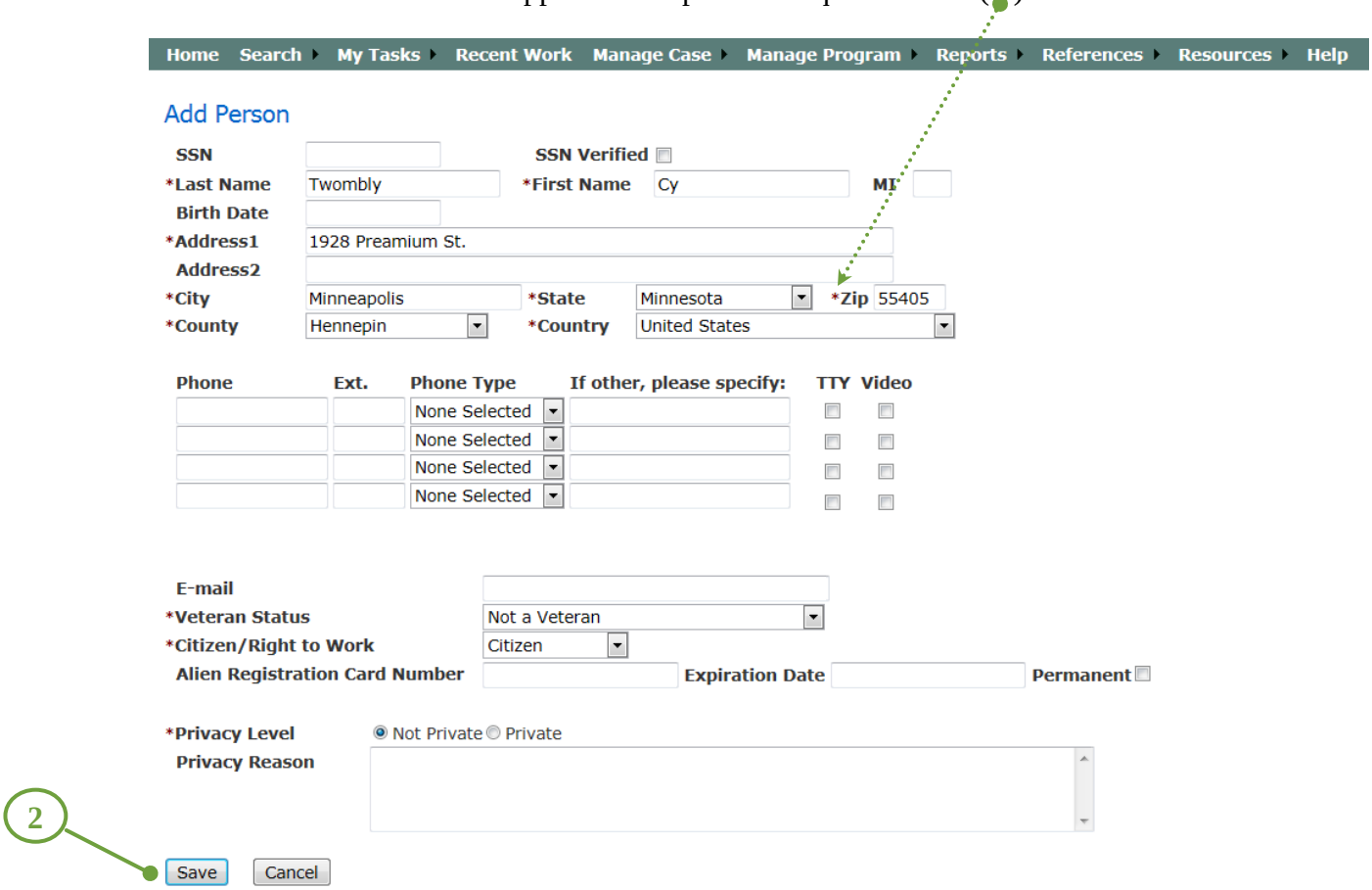
5. Click on the **Program/New App** tab to begin your United Way funded program's intake process.

If No Record Exists

1. Click on **Add a New Person Record**.



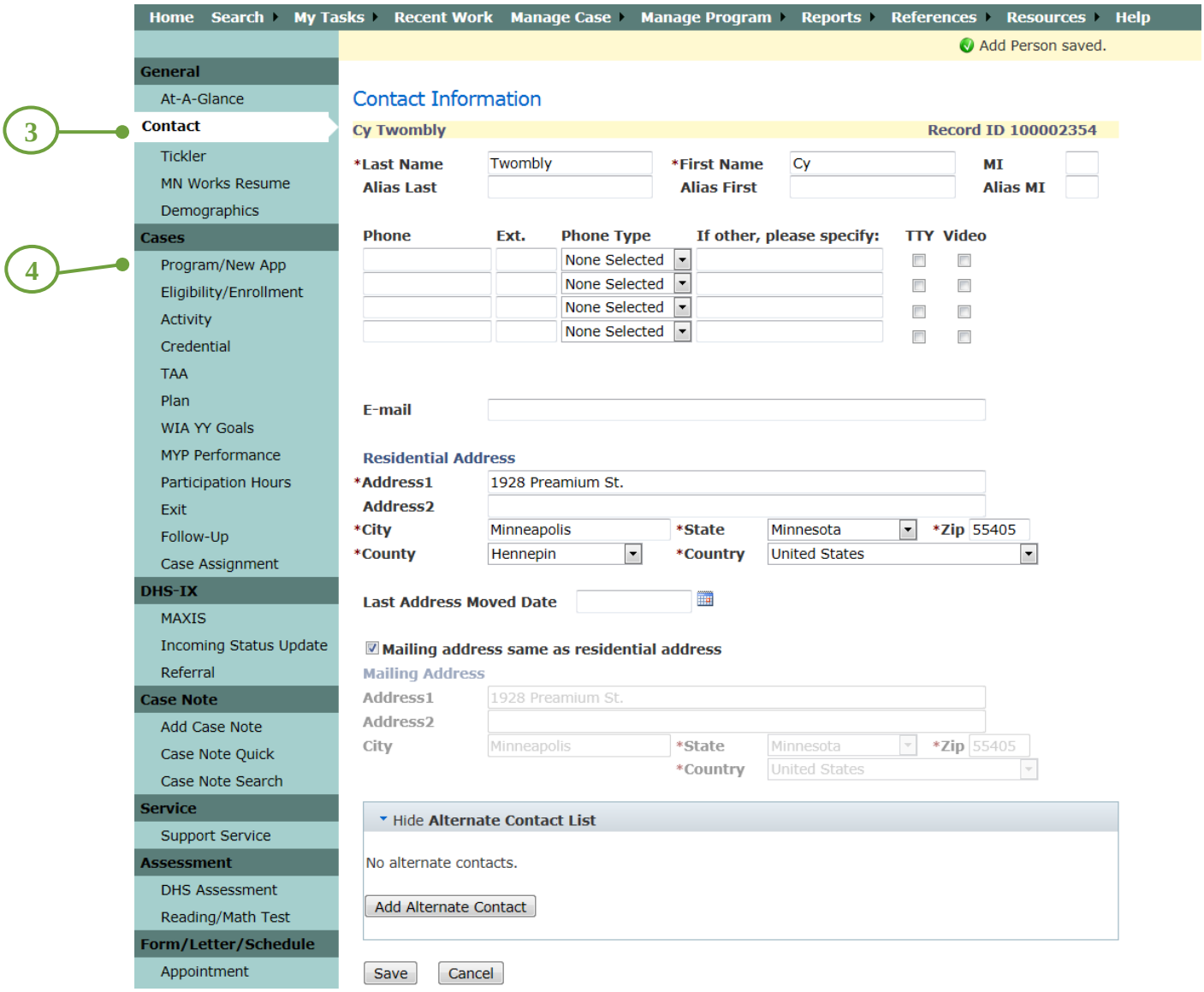
2. A blank **Add Person** screen appears. Complete all required fields (*). Press **Save**.



Citizen/Right to Work indicates that the person is a United States citizen or possesses documented authorization to work in the United States.

Check "Yes" for *Veteran Status* if the person actively served in the United States Armed Forces and was not dishonorably discharged. NOTE: If the person is a spouse of a veteran, check "Yes" for *Veteran Status*. When an enrollment record is created later, choose "Other Eligible" under *Veteran Type*.

3. The **General > Contact** screen appears with your client's contact and demographic information.



4. Click on the **Program/New App** tab to begin the intake process for your United Way funded program.

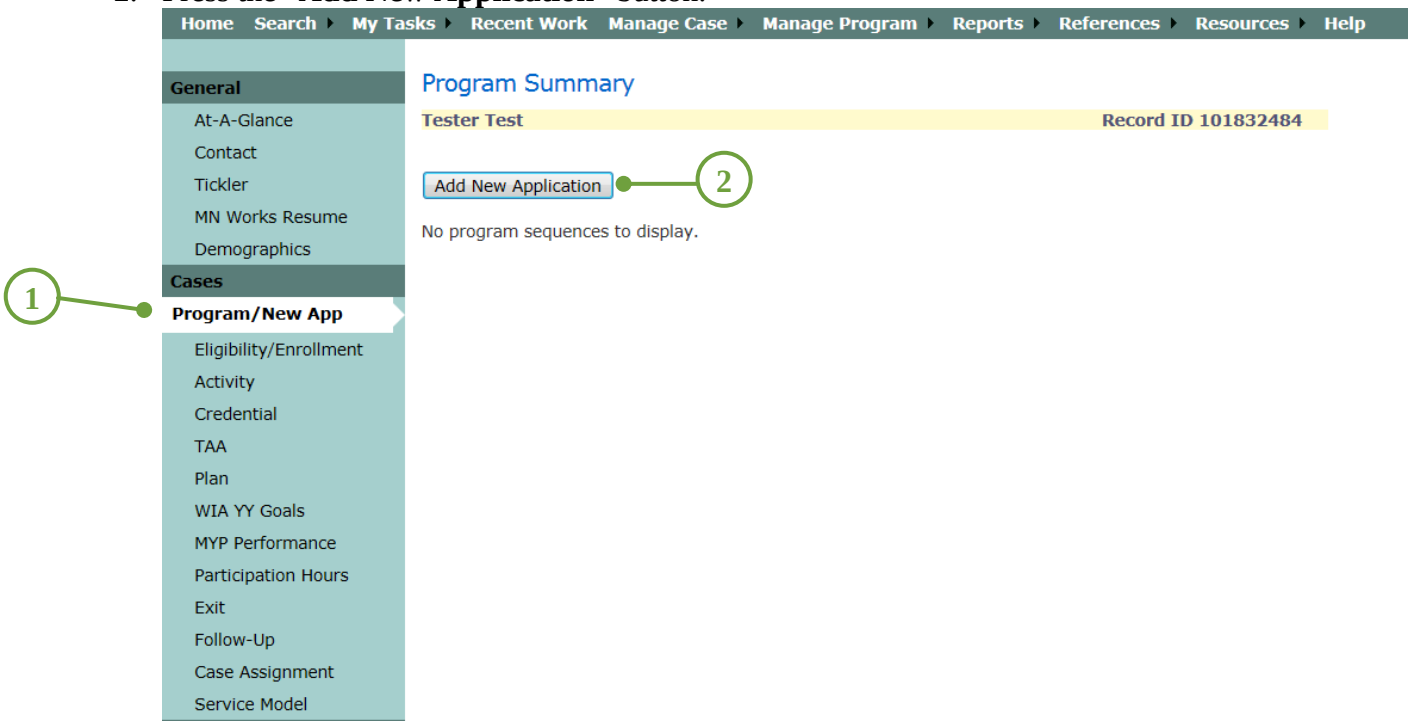
INTAKE ENTRY

To enroll a client into a United Way funded program, you start by opening an **Application** and finish by confirming their **Enrollment**. For United Way's purposes, you can ignore the **Eligibility** tab.

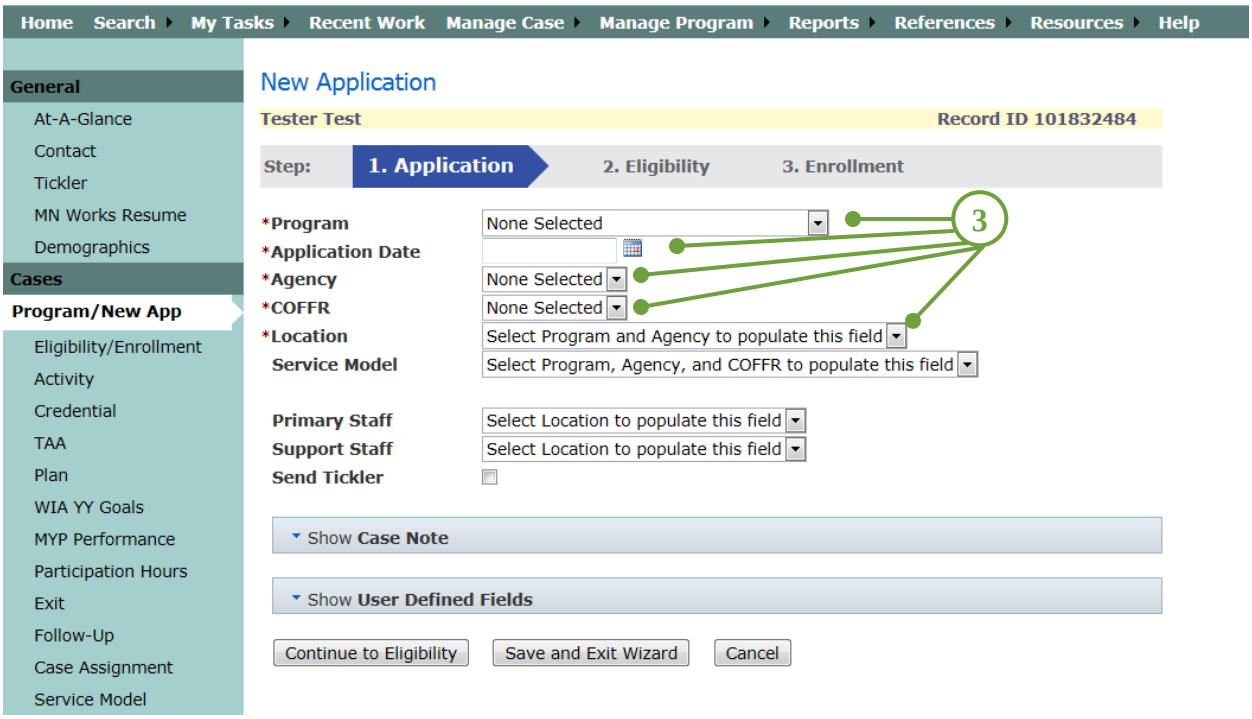
Application

1. In your participants account, click on **Cases > Program/New App** to view the client's Application Summary table.

2. Press the "**Add New Application**" button.

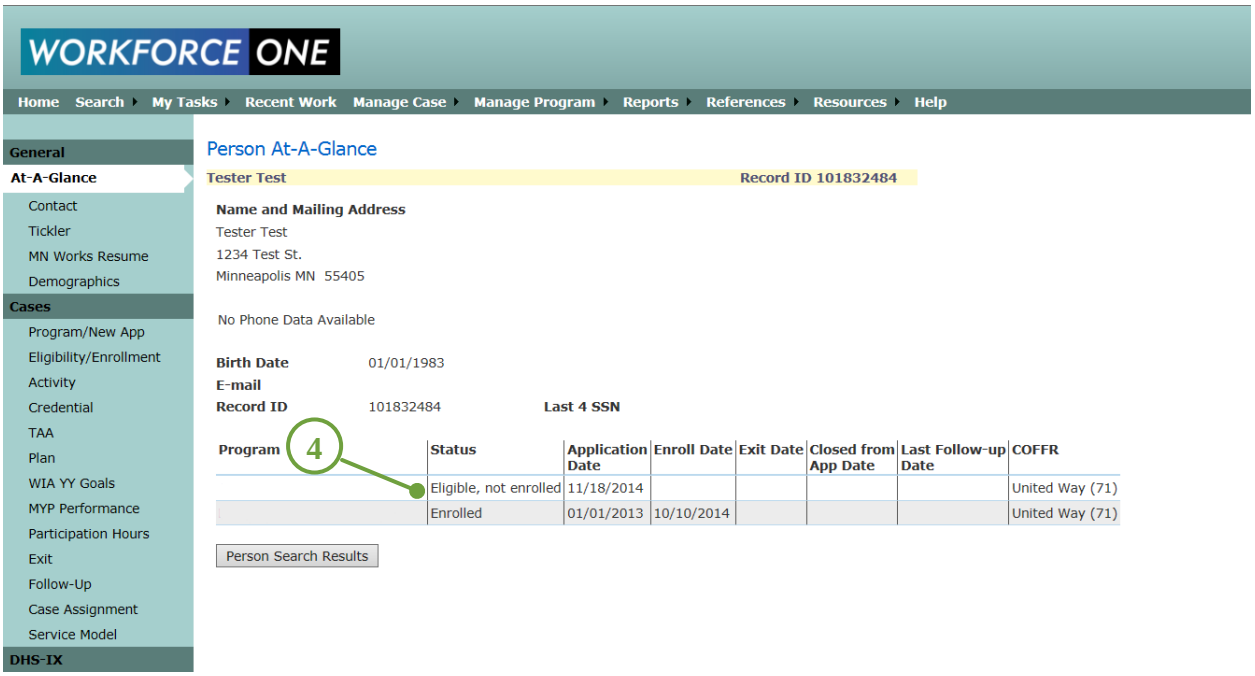


3. In the drop-down list for *program*, find and select the name of your agency's program. Enter the *Application Date* in this format: MM/DD/YYYY. Under the *Agency* drop-down list, select your agency. Under the *COFFR* drop-down list, select United Way – SDA 71. Under *Location*, select the location of your program. Assign a staff person (optional). Click on **Continue to Eligibility**.



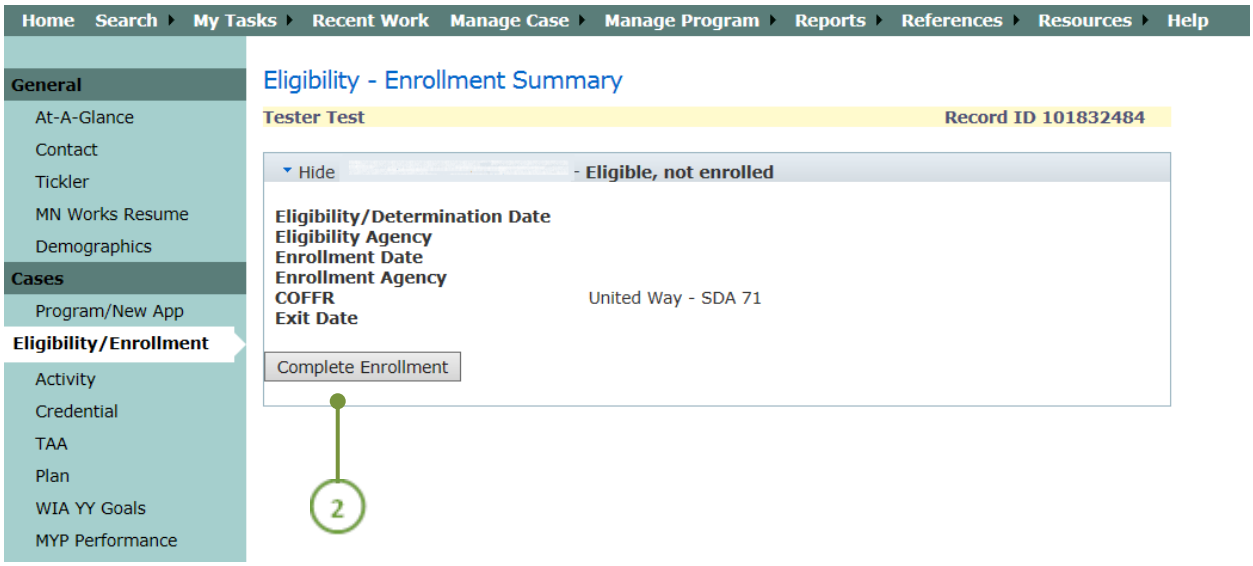
! The application date cannot be a future date or more than six months old. In addition, when the *Program* name is selected, the *Agency* and *COFFR* name might appear.

4. The At-A-Glance page now lists the individual's status in the program as "Eligible, not enrolled" in the **Status** column.



Eligibility/Enrollment

1. Go to **Cases > Eligibility/Enrollment**.
2. If more than one program is available to select, select the desired program from the list. Click on **Complete Enrollment**.



3. You should now see a page entitled **[Program Name] Enrollment**.
4. Fill out all of the required fields on the **[Program Name] Enrollment** page (marked by red asterisks). United Way requires that you enter the following data:

- *Family Status* indicates who the person lives with. The choices are:
  - Not a family member: does not live with any family members.
  - Other family member: lives with one or more family members but is not a parent.
  - Parent in one-parent family: has sole custodial responsibility for one or more dependent children.
  - Parent in two-parent family: shares responsibility with another person for dependent children.

- *Labor Force Status* at time of enrollment:
  - Employed full time: a person who is working 30 hours per week or more.
  - Employed part time: a person who is working less than 30 hours per week or less.
  - Employed, received term notice/military separation: person is employed but has received a notice of termination employment from employer or is a Transitioning Service Member.
  - Not employed and previously not self-employed: unemployed or not actively seeking employment.
  - Not employed and previously self-employed, farm: is now unemployed.

  - Not employed and previously self-employed, non-farm: is now unemployed.

- *Disability Status* is a self-reported physical, mental, or learning disability, emotional/behavioral disorder, or substance abuse that has an impact on employability. The choices are:
  - Not disabled.
  - Yes, and disability is an employment barrier.
  - Yes, disability not a barrier to employment.

- *Limited English Language Proficiency,* "Yes" for English-as-a-Second-Language speakers whose language barriers impede employment.

- *Veteran Status,* "Yes" if the person actively served in the United States Armed Forces and was not dishonorably discharged. NOTE: If the person is a spouse of a veteran, choose "Yes."

- *TANF/MFIP Recipient,* "Yes" if the person participates in Temporary Assistance for Needy Families/Minnesota Family Investment Program.

- *Refugee Assistance Recipient,* "Yes" if the person receives refugee assistance through a county human services agency.

- *General Assistance Recipient,* "Yes" if the person receives general assistance through a county human services agency.

- *Food Support Recipient,* "Yes" if the person receives Food Support (formerly called Food Stamps) through a county human services agency.

- *Actual Family Size* Enter the number of persons related by blood, marriage or adoption living in a single residence whose income must be counted for program eligibility (same definition as *Eligible Family Size*).

- *Annual Family Income* Multiply eligible family members' earnings **(actual earned wages from employment)** from the past six months by two and enter the result. Determine self-employment earnings from the most recent Federal Income Tax return or a more-up-to date record. Pro-rate a separated or divorced applicant's earnings on the length of time during the last six months that the applicant lived with the other wage earner.

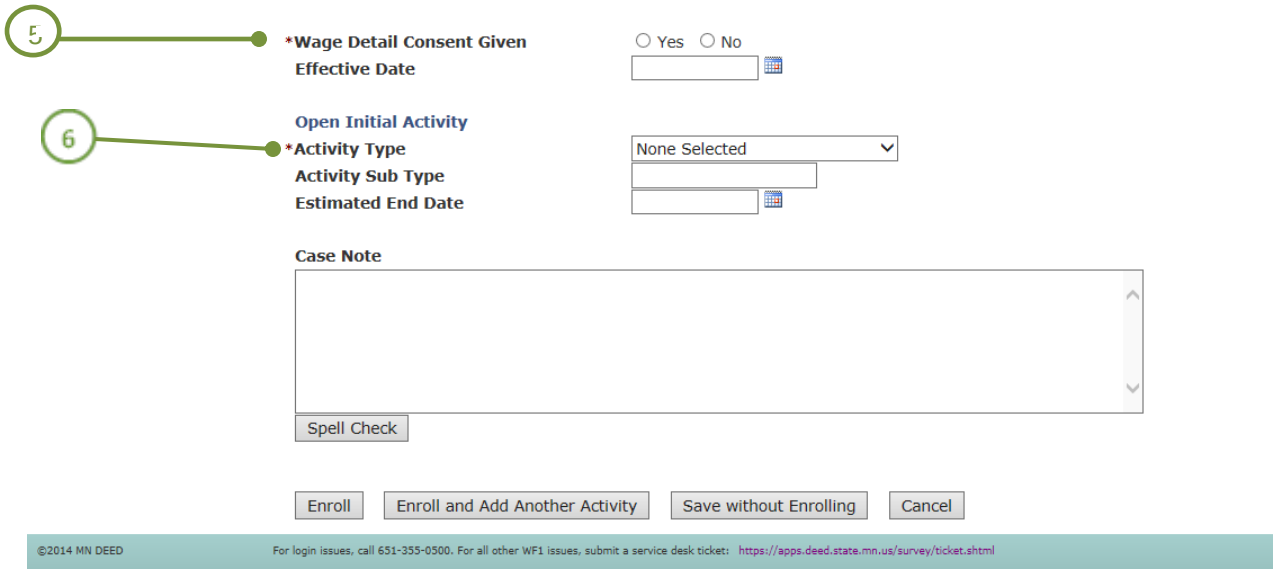
- *UI Benefit Status* indicates if the person receives Unemployment Insurance (UI) or is eligible to. The choices are:
  - Eligible: Not Claimant: is eligible but has **not** claimed benefits.
  - Eligible Claimant: is receiving UI benefits.
  - Exhaustee: has exhausted UI benefits (excluding Federal Supplemental Additional or Extended Benefits).

- Ineligible Labor Force Attachment: was employed but is ineligible due to insufficient earnings or employer was not required to provide UI benefits.
- Not Eligible/Applicable: is not eligible for UI benefits.

- *Homeless*, "Yes" if the person lacks a fixed, regular and adequate nighttime residence or whose nighttime residence is a supervised, temporary living accommodation or shelter.

- *Offender Status*, "Yes" if the person has been convicted of a felony and/or incarcerated due to a felony in the past 7 years.

5. You should have had the client fill out a Wage Detail Consent Form, for which a template is provided by United Way (see pg. 41). Depending on how the client answered this form, choose "Yes" or "No" for the question: *Person has given consent to obtain Wage Detail.*
6. At the bottom of the enrollment page, you will see an option for opening an activity for the client. The first time you enroll a client in an activity, you should select "Assessment/Testing" under the drop down menu for **Activity Type**.



7. If you cannot complete all your data entry at this time, scroll to the end of the web page and click **Save Without Enrolling**. If there are more activities to be added, click **Enroll and Add Another Activity**. When finished entering all the required fields listed on this page, click **Enroll**.

ACTIVITY

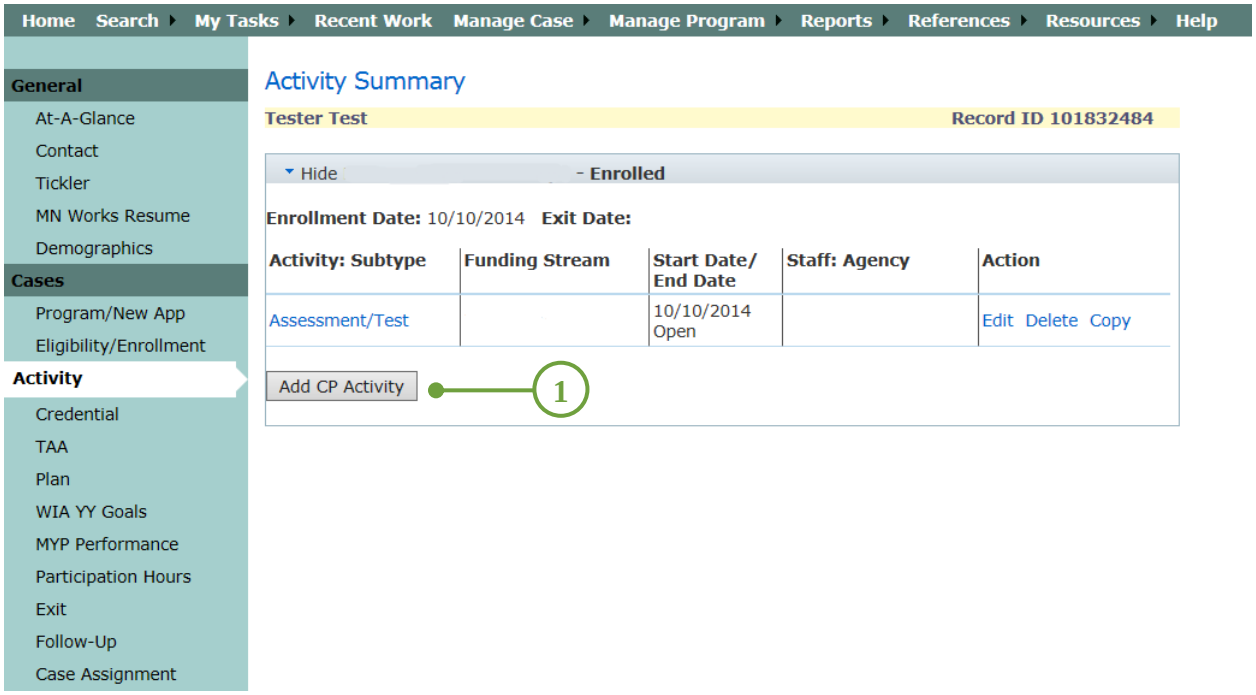
The *Activity* section records key data required by United Way for Return on Investment analysis. Capturing data is particularly important for three indicators that United Way considers as outcomes: job placement, 6 month retention, and 12 month retention. These milestones are listed as "Activities" in WF1; however, United Way considers them outcomes (refer to logic model on page 3).

It is not intuitive that the three outcomes will be recorded in the "Activities" section instead of the "Outcomes" section in WF1. However, to capture sufficient data for reporting purposes, this is how it will need to be entered.

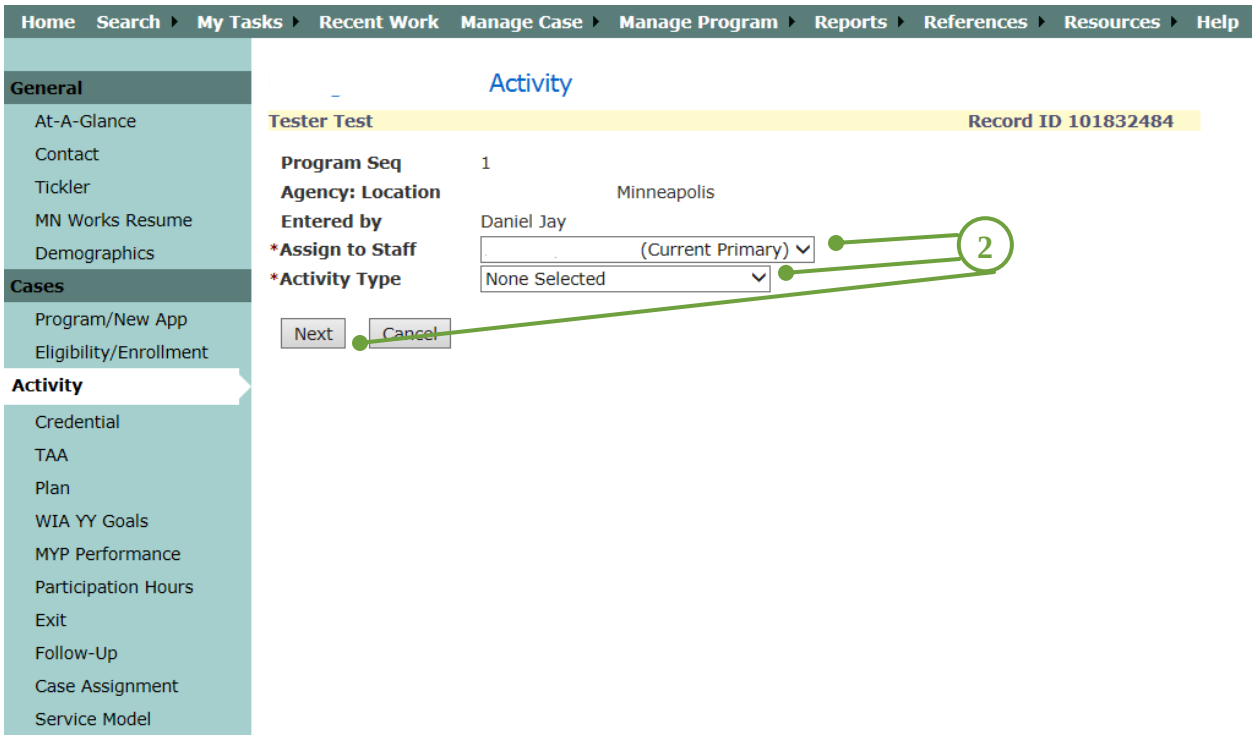
Entering data in the *Activity* section helps track participants' steps toward their goals. This section will describe how to open, update and close an activity.

Open a New Activity

1. Go to **Cases > Activity**. Press **Add CP Activity**



2. Click the *Assign to Staff* dropdown, and select the necessary staff member. Next, click the *Activity Type* dropdown and select the correct activity for the participant. You must complete all required fields before hitting **Next**.



Activity Definitions

United Way *Activity Type* options are:

- **12 Month Retention** – The point at which program participants demonstrate 12 months of continuous employment/continue to be employed 365 days post-placement. Twelve-month job retention is reflective of the job placements that occur a full year prior to reporting year.

- **6 Month Retention** – The point at which program participants demonstrate 6 months of continuous employment /continue to be employed 180 days post-placement.

- **Assessment/Testing** – An evaluation of the participant's capabilities, needs, and vocational potential. This includes assessment to identify skills, career interests, goals, eligibility/fit for program, and barriers.

- **Basic Skills Training** – Program provided for students who need goal-specific elementary or secondary-level basic skills such as work-related math, functional literacy, reading, or writing assistance.

- **Financial Education Services** – Classes or workshops that provide participants with the skills and knowledge they need to make informed and effective financial decisions. This includes two hours of financial coaching, increase in a participant's knowledge of financial education via pre/post-test, and helping them implement a savings/spending plan.

- **Individual Plan Development** - Counselors must determine the length of training by an accurate assessment of the job difficulty, the participant's skill and education, previous work experience, and discussions with the proposed employer.

- **Job Placement** – The point at which individuals enter unsubsidized employment in a competitive placement as a result of participating in the program during the reporting year (typically this is a calendar year).

- **Occupational Skills Training** - An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels.[2]

- **Paid Work Experience** - Participants' engagement in temporary or transitional employment to gain basic work readiness, maturity, competency and skills (e.g. paid internships, supported work, temporary staffing).

- **Placement Services** – Services leading to a job placement including job search and placement assistance, counseling, testing, background checks, working with the employer and job seeker, workshops, resume-building, and interview preparation.

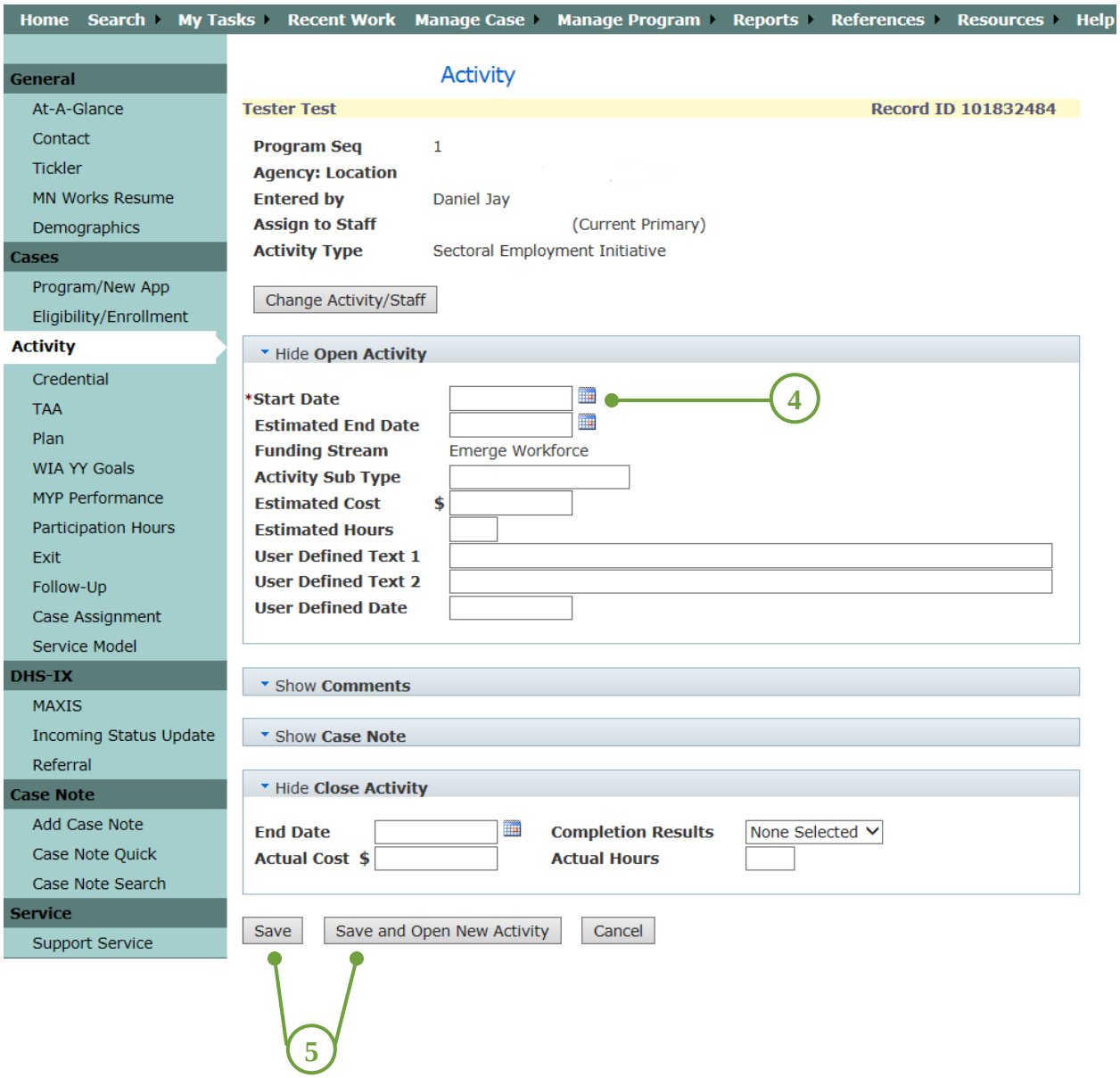
- **Support Services** - Childcare, clothes, drug and alcohol counseling, emergency financial assistance, family involvement, healthcare, needs related payment, personal counseling, temporary shelter, transportation, and other services (see the glossary for a table of support services).

Note: *Even though 12 Month Retention, 6 Month Retention, and Job Placement are listed as activities, they are considered outcomes by United Way. Please see details about the information that United Way requires to be entered under these activities below.*

3. Click **Next** to retain all the information as entered into the **Activity** tab.

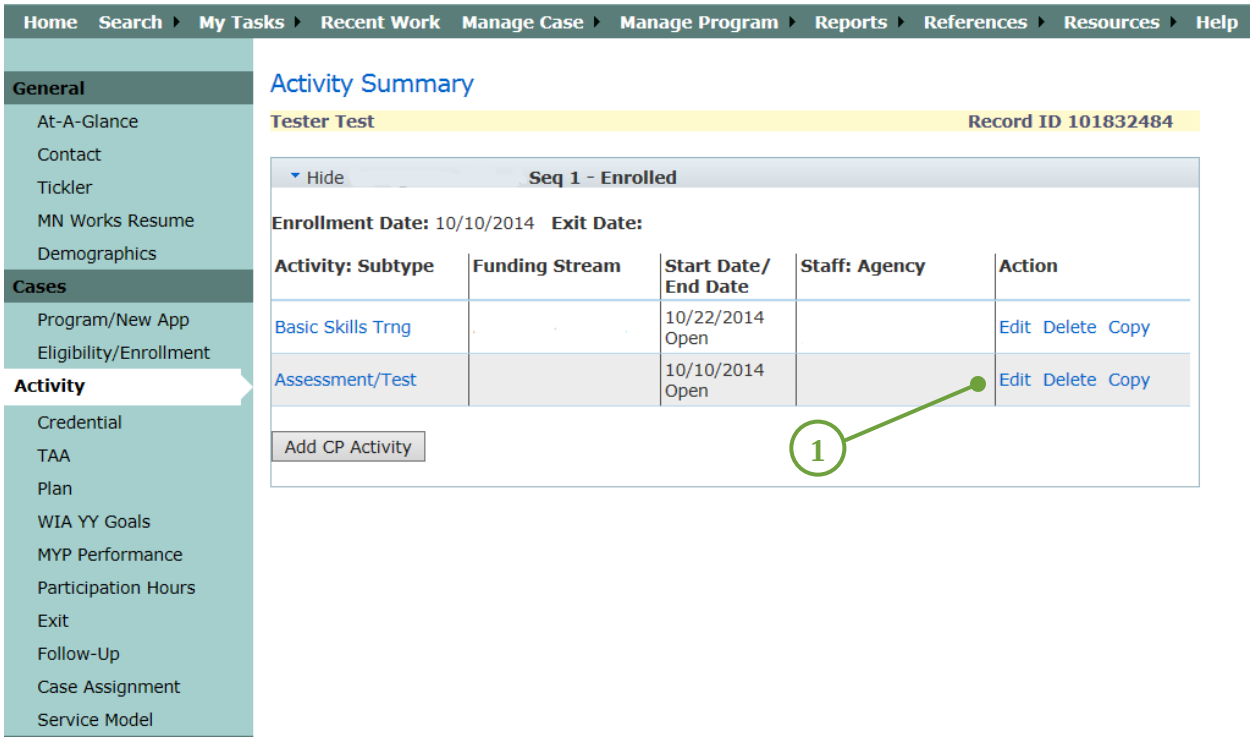
4. Click **Save** to complete and retain all entered Activity information. Or click **Save and Open New Activity to** save inputted information and go back to Activity Summary page, where another activity can be added.

[2] The definition of "occupational skills training" comes from Social Policy Research Associates & Public/Private Ventures.

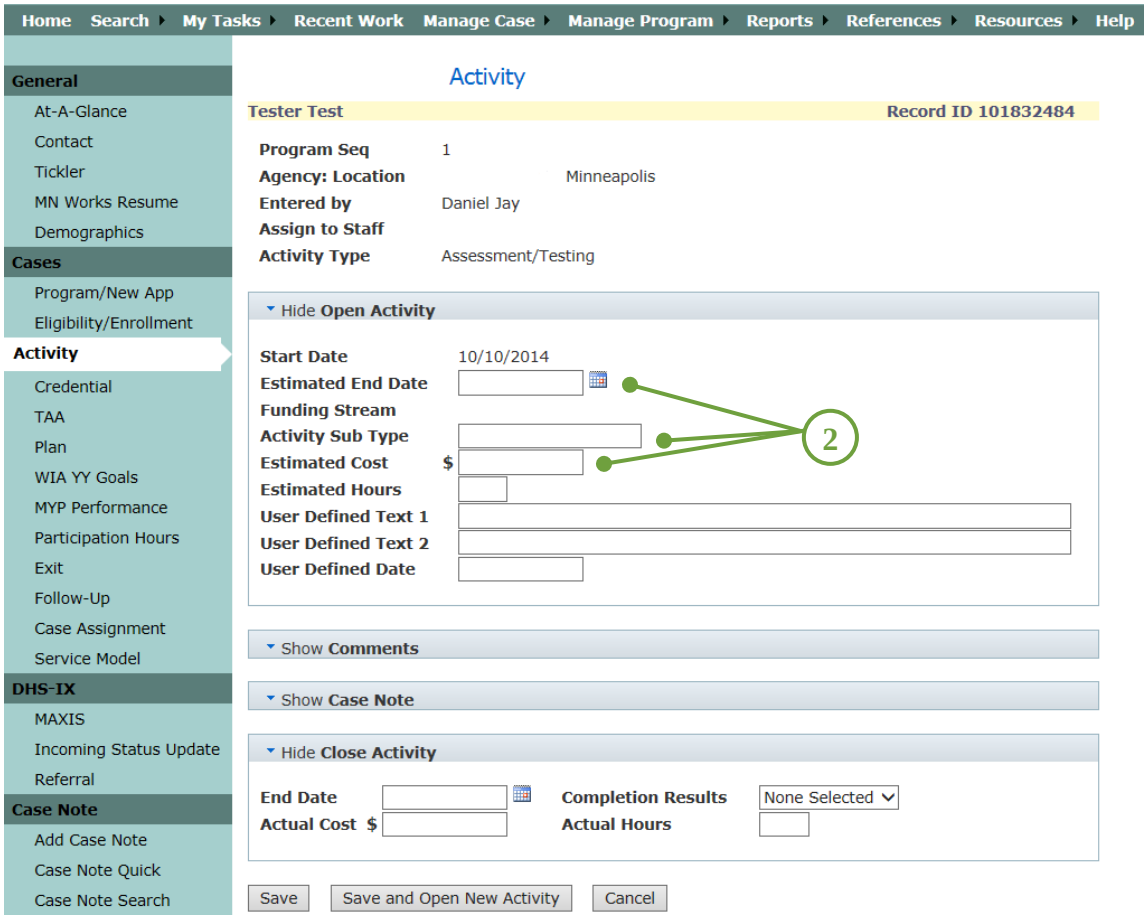

Home
Search
My Tasks
Recent Work
Manage Case
Manage Program
Reports
References
Resources
Help
General
At-A-Glance
Contact
Tickler
MN Works Resume
Demographics
Cases
Program/New App
Eligibility/Enrollment
Activity
Credential
TAA
Plan
WIA YY Goals
MYP Performance
Participation Hours
Exit
Follow-Up
Case Assignment
Service Model
DHS-IX
MAXIS
Incoming Status Update
Referral
Case Note
Add Case Note
Case Note Quick
Case Note Search
Service
Support Service
Activity
Tester Test
Record ID 101832484
Program Seq 1
Agency: Location
Entered by Daniel Jay
Assign to Staff (Current Primary)
Activity Type Sectoral Employment Initiative
Change Activity/Staff
Hide Open Activity
*Start Date
Estimated End Date
Funding Stream Emerge Workforce
Activity Sub Type
Estimated Cost $
Estimated Hours
User Defined Text 1
User Defined Text 2
User Defined Date
4
Show Comments
Show Case Note
Hide Close Activity
End Date
Completion Results None Selected
Actual Cost $
Actual Hours
Save
Save and Open New Activity
Cancel
5

Update an Open Activity

1. Select an existing activity from the **Action** column OR, you may start a new activity.

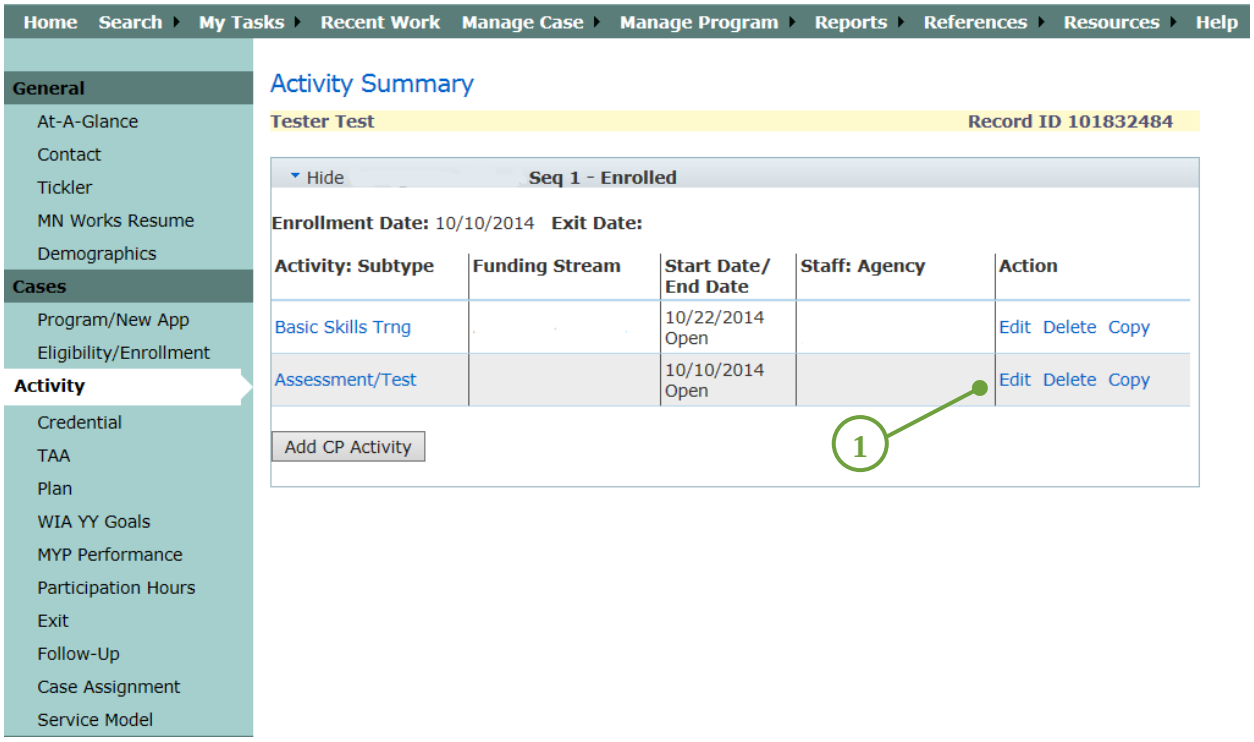


2. You can update most fields, except *Activity Type* and *Start Date*. Click **Save**.



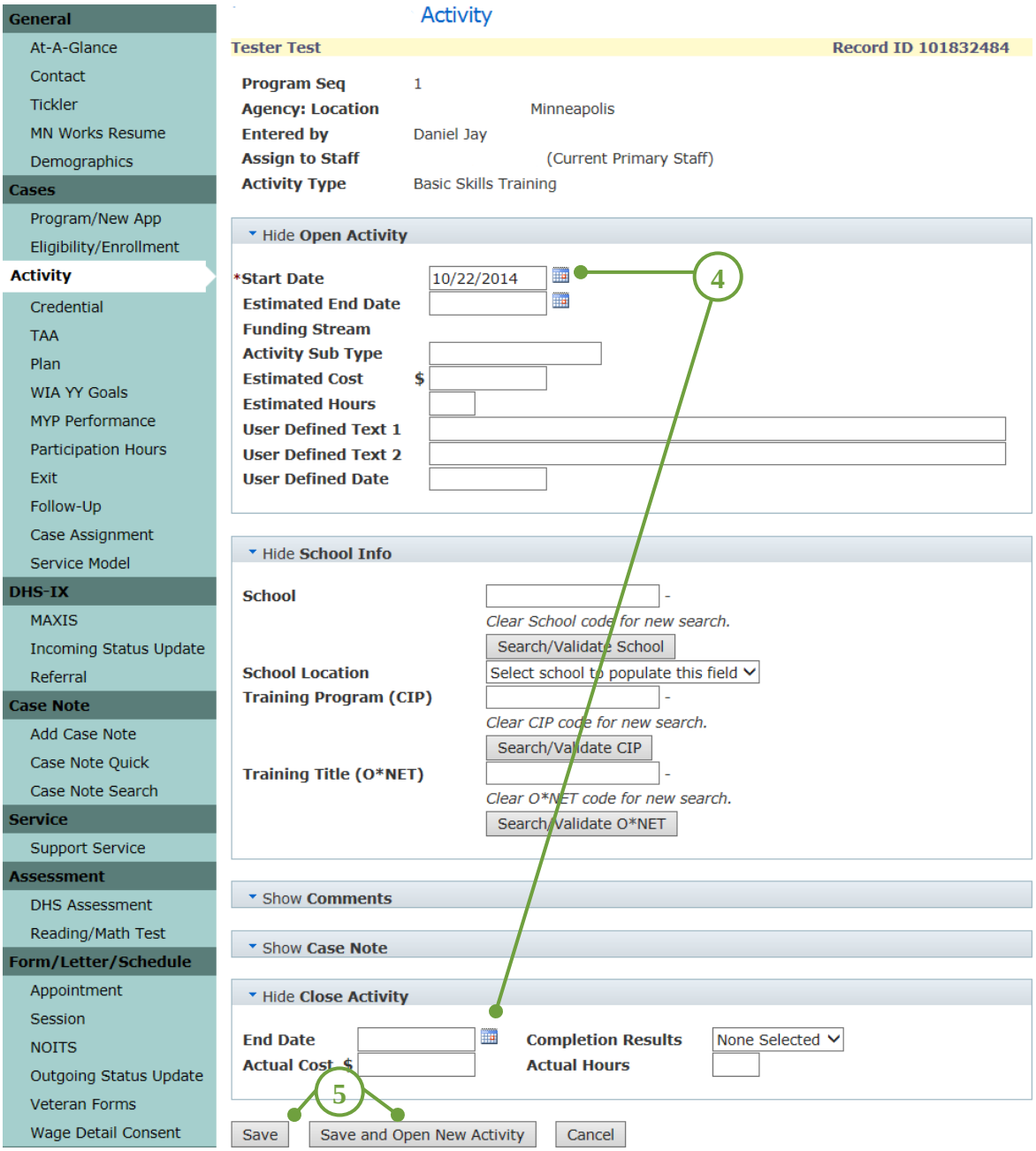
Close an Activity

1. Go to **Program** > **Activity Status**. Click on "LP *Your Program Name*."



2. At the bottom of the **Activity** page, click the **Show Activity** tab IF it is hidden.

3. Input participants Activity closure information in the open fields and dropdown menu



4. Enter all the information for required fields as well as information required by United Way as listed in the "United Way Activities" Section below. <u>The following is a list of definitions for data elements captured within the **Activities** section of WF1 by United Way:</u>
   - *Start Date*
   - *End Date*

   Start Date: Cannot be prior to Enrollment Date and can be a future date.

End Date: The date at which the participant completes the service, activity, or program.

**Note*: You can have multiple activities open until you decide to enter an outcome into WF1.

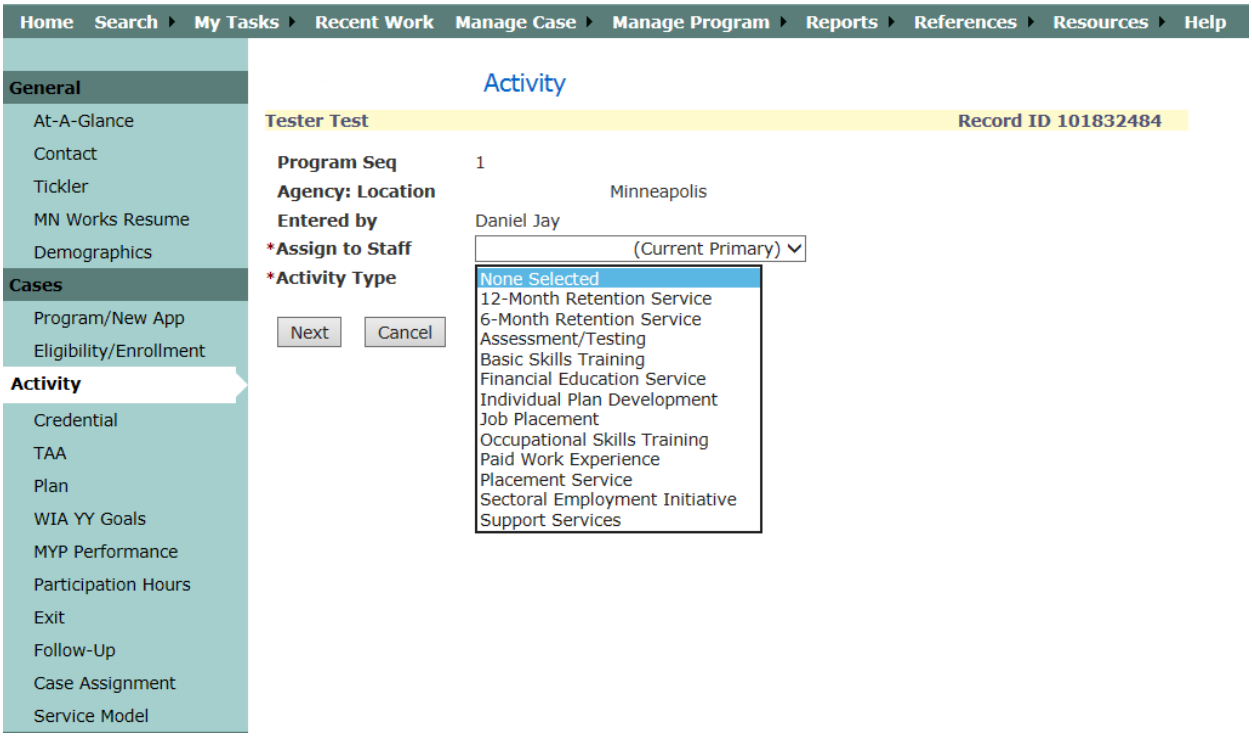
5. Click **Save** to complete and retain all entered Activity information. Click **Save and Open New Activity** save inputted information and go back to Activity Summary page, where another activity can be added.

! The End Date cannot be prior to the start date nor more than 14 days into the future.

UNITED WAY ACTIVITIES

The *Activity Status* section records key data required by United Way and tracks a participant's steps toward a goal. It is important to note that three categories that are labeled as "activities" in the WF1 system are considered to be outcomes by United Way (12 Month Retention, 6 Month Retention, and Job Placement).

This section describes how to open, update, close an activity, and the data that United Way requires from grantees for each activity. Below is a screenshot providing you with an example of a screen similar to what you would see under the *Activity Status* section in WF1. The screenshot does not show all the fields that are required by United Way or by the WF1 system.



Assessment/Testing

1. **Assessment** definition: An evaluation of the participant's capabilities, needs, and vocational potential. This includes assessment to identify skills, career interests, goals, eligibility/fit for program, and barriers.

2. Go to **Cases > Activity**. Since you should have enrolled the participant in the "Assessment" activity during the Intake process *(refer back to page 16)*, this activity should now be displayed in the **Program Activity Status Summary** table.

3. Click on **Assessment** under Activity Type.

4. United Way Required Fields:

a. *Start Date.* Cannot be prior to Enrollment Date and can be a future date.

b. *Completion Results.* Select whether or not the client satisfactorily completed an activity.

c. *End Date.* The date at which the participant completes the service, activity, or program.

5. Click **Save**.

Individual Plan Development

1. **Individual Plan Development** definition: Counselors must determine the length of training by an accurate assessment of the job difficulty, the participant's skill and education, previous work experience, and discussions with the proposed employer.

2. Navigate to the **Activity** page.

3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Individual Plan Development** from the *Activity Type* drop-down.

4. Click on the button **Next** at the bottom of the page.

5. United Way Required fields:

   a. *Start Date.* Cannot be prior to Enrollment Date and can be a future date.

   b. *Completion Results.* Select whether or not the client satisfactorily completed an activity.

   c. *End Date.* The date at which the participant completes the service, activity, or program.

6. Click **Save**.

Basic Skills Training

1. **Basic Skills Training** definition: Program provided for students who need goal-specific elementary or secondary-level basic skills such as work-related math, functional literacy, reading, or writing assistance.

2. Go to **Cases > Activity.**

3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Basic Skills Training** from the *Activity Type* drop-down.

4. Click on the button **Next** at the bottom of the page**.**

5. United Way Required Fields

    a. *Start Date.* Cannot be prior to Enrollment Date and can be a future date. *Note: If a client is actively involved with another program prior to enrolling in your program, use the date they enrolled in your program.

    b. *School*. Use the **School Lookup** hyperlink to search for the school associated with this activity. If the school is not listed, scroll down to the field, *User Defined Text 1*. Type the school name into this blank field.

    c. *Partner program*. Select the partner program, if any, paying for this service.

    d. *Completion results*. Select whether or not the client satisfactorily completed an activity.

    e. *End date*. The date at which the participant completes the service, activity, or program.

6. Click **Save.**

Occupational Skills Training

1. **Occupational Skills Training** definition: An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels.

2. Go to **Cases > Activity.**

3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Occupational Skills Training** from the *Activity Type* drop-down.

4. Click on the button **Next** at the bottom of the page**.**

5. United Way Required Fields:

    a. From the *Activity Status Type* drop-down, select "Occupational Skills Training"

    b. *Start Date.* Cannot be prior to Enrollment Date and can be a future date. *Note: If a client is actively involved with another program prior to enrolling in your program, use the date they enrolled in your program.

    c. *School*. Use the **School Lookup** hyperlink to search for the school associated with this activity. If the school is not listed, scroll down to the field, *User Defined Text 1*. Type the school name into this blank field.

    d. *Partner Program.* Select the partner program, if any, paying for this service.

    e. *Completion Results.* Select whether or not the client satisfactorily completed an activity.

    f. *Certificate type attained.* Identify which certificates and/or credentials the client attained (if any) in this area.

g. *End Date. The date at which the participant completes the service, activity, or program.*

6. Click **Save**.

Placement Services

1. **Placement Services** definition: Services leading to a job placement including job search and placement assistance, counseling, testing, background checks, working with the employer and job seeker, workshops, resume-building, and interview preparation.
2. Go to **Cases > Activity.**
3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Placement Services** from the *Activity Type* drop-down.
4. Click on the button **Next** at the bottom of the page**.**
5. United Way Required Fields
   a. From the *Activity Status Type* drop-down, select "Placement Services"
   b. *Start Date*. Cannot be prior to Enrollment Date and can be a future date.
   c. *Estimated Hours.* The participant's estimated hours for this activity.
   d. *Partner Program.* Select the partner program, if any, paying for this service.
   e. *Completion Results*. Select whether or not the client satisfactorily completed an activity.
   f. *End Date. The date at which the participant completes the service, activity, or program.*
6. Click **Save**.

Note: United Way considers job placement as one of its three outcomes, along with 6 month and 12 month retention. In WF1, counselors/staff will record these outcomes and their details in the "Activities" section. This is counterintuitive, but needs to be done for reporting and analysis purposes.

Job Placement

1. **Job Placement** definition: The point at which individuals enter unsubsidized employment in a competitive placement as a result of participating in the program during the reporting year (typically this is a calendar year).
2. Go to **Cases > Activity.**
3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Job Placement** from the *Activity Type* drop-down.
4. Click on the button **Next** at the bottom of the page**.**

5. United Way Required Fields
    a. From the *Activity Status Type* drop-down, select "Job Placement"
    b. *Start Date.* Cannot be prior to Enrollment Date and can be a future date.
    c. *Estimated Hours.* The participant's estimated hours for this activity.
    d. *Hourly Wage.* If the participant works multiple jobs, calculate the average as the total weekly earnings divided by total hours worked.
    e. *Health Coverage*. The field labeled "User Defined Text 1:" should describe the participant's health care status. Enter one of the following options upon closing the activity in WF1:
        - *True.* If covered by employer enter
        - *False.* If not covered by employer enter
    f. *End Date.* The date at which the participant completes the service, activity, or program.

6. Click **Save**.

6 Month Retention Services

6 Month Retention definition: The point at which program participants demonstrate 6 months of continuous employment /continue to be employed 180 days post-placement.

1. Go to **Cases > Activity.**
2. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **6 Month Retention** from the *Activity Type* drop-down.
3. Click on the button **Next** at the bottom of the page**.**

4. United Way Required Fields
    a. From the *Activity Status Type* drop-down, select "6-Month Retention"
    b. *Start Date. Cannot be prior to Enrollment Date and can be a future date.*
    c. *Estimated Hours.* The participant's estimated hours for this activity.
    d. *Hourly Wage.* If the participant works multiple jobs, calculate the average as the total weekly earnings divided by total hours worked.
    e. *Health Coverage*. The field labeled "User Defined Text 1:" should describe the participant's health care status. Enter one of the following options upon closing the activity in WF1:
        - *True.* If covered by employer enter

- *False*. If not covered by employer enter

f. *End Date*. The date at which the participant completes the service, activity, or program.

g. Click **Save**.

12 Month Retention Services

1. **12-Month Retention** definition: The point at which program participants demonstrate 12 months of continuous employment/continue to be employed 365 days post-placement. Twelve-month job retention is reflective of the job placements that occur a full year prior to reporting year.
2. Go to **Cases > Activity.**
3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **12 Month Retention** from the *Activity Type* drop-down.
4. Click on the button **Next** at the bottom of the page**.**
5. United Way Required Fields
   a. From the *Activity Status Type* drop-down, select "12-Month Retention"
   b. *Start Date*. Cannot be prior to Enrollment Date and can be a future date.
   c. *Estimated Hours.* The participant's estimated hours for this activity.
   d. *Hourly Wage.* If the participant works multiple jobs, calculate the average as the total weekly earnings divided by total hours worked.
   e. *Health Coverage*. The field labeled "User Defined Text 1:" should describe the participant's health care status. Enter one of the following options upon closing the activity in WF1:
      - *True.* If covered by employer enter
      - *False.* If not covered by employer enter
   f. *End Date.* The date at which the participant completes the service, activity, or program.
6. Click **Save**.

Support Services

1. **Support Services** definition: Childcare, clothes, drug and alcohol counseling, emergency financial assistance, family involvement, healthcare, needs related payment, personal counseling, temporary shelter, transportation, and other services.
2. Go to **Cases > Activity.**
3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Support Services** from the *Activity Type* drop-down.
4. Click on the button **Next** at the bottom of the page**.**
5. United Way Required Fields
    a. From the *Activity Status Type* drop-down, select "Support Services"
    b. *Start Date.* Cannot be prior to Enrollment Date and can be a future date.
    c. *Partner Program.* Select the partner program, if any, paying for this service.
    d. *Completion Results.* Select whether or not the client satisfactorily completed an activity.
    e. *End Date*. The date at which the participant completes the service, activity, or program.
6. Click **Save**.

Paid Work Experience

1. **Paid Work Experience** definition: Participants' engagement in temporary or transitional employment to gain basic work readiness, maturity, competency and skills (e.g. paid internships, supported work, temporary staffing).
2. Go to **Cases > Activity.**
3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Paid Work Experience** from the *Activity Type* drop-down.
4. Click on the button **Next** at the bottom of the page**.**
5. United Way Required Fields
    a. From the *Activity Status Type* drop-down, select "Paid Work Experience"
    b. *Start Date*. Cannot be prior to Enrollment Date and can be a future date.
    c. *Estimated Hours*. The participant's estimated hours for this activity.
    d. *Hourly Wage*. If the participant works multiple jobs, calculate the average as the total weekly earnings divided by the total hours worked.

e. *End Date*. The date at which the participant completes the service, activity, or program.

6. Click **Save**.

Financial Education Services*

1. **Financial Education Services** definition: Classes or workshops that provide participants with the skills and knowledge they need to make informed and effective financial decisions. This includes two hours of financial coaching, increase in a participant's knowledge of financial education via pre/post-test, and helping them implement a savings/spending plan.
2. Go to **Cases > Activity.**
3. OR, click the **Save and Open New Activity Status** button at the bottom of the page and select **Financial Education Services** from the *Activity Type* drop-down.
4. Click on the button **Next** at the bottom of the page**.**

5. United Way Required Fields:

   a. From the *Activity Status Type* drop-down, select "Financial Education"

   b. *Start Date.* Cannot be prior to Enrollment Date and can be a future date.

   c. *Completion Results.* If the participant completed two hours of financial coaching/classes, select the option that states, "Satisfactorily Completed" from the drop-down menu.

   d. *User Defined Text 1.* If the participant demonstrates increased knowledge of financial education via pre/post-test, enter "True." Otherwise, enter "False".

   e. *User Defined Text 2.* If the program has helped the participant successfully implement a Savings and Spending Plan, enter "True." Otherwise, enter "False."

   f. *End Date. The date at which the participant completes the service, activity, or program.*

6. Click **Save**.

**Note:* This was an optional indicator in the RFP process; however, if your agency committed to reporting on this indicator, then you must enter the information above.

Exiting a Participant

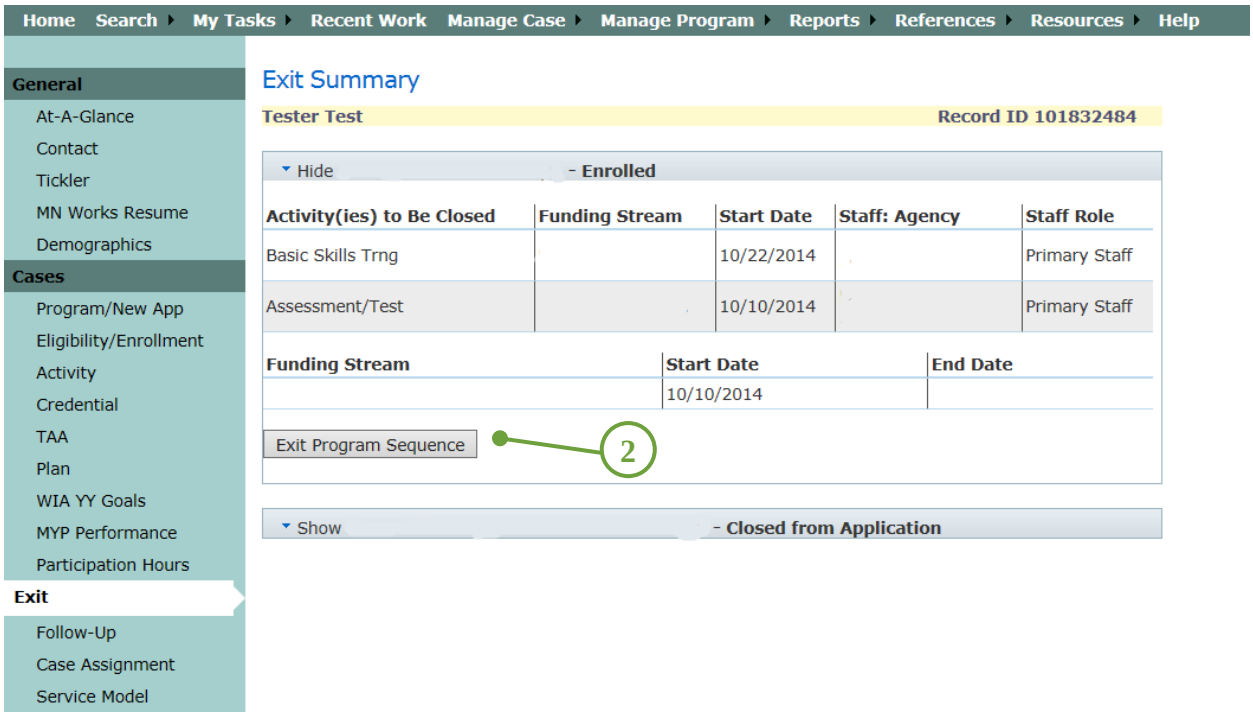
This section of WF1 records whether or not the participant has achieved the program's three combined outcomes: Job Placement, 6 Month Retention, and 12 Month Retention. Since you cannot close a record in WF1 without closing all the activities in that record, you should not create an outcome until the person that you are serving has retained their unsubsidized employment for 12 months or exits the program. You may close the participant's United Way program record if he or she exited voluntarily or involuntarily.

All United Way funded-programs in the Jobs and Training Area have the three objectives of Job Placement, 6-Month Retention, and 12-Month Retention recorded in the "Activities" section of WF1. When a participant achieves any of these, details (such as wage and start date) should be captured under the Activities section. Refer back to pages 28-36 for more information.

If a participant achieves all three of these outcomes and is ready to exit, then you are ready to record it here.

Selecting an Outcome

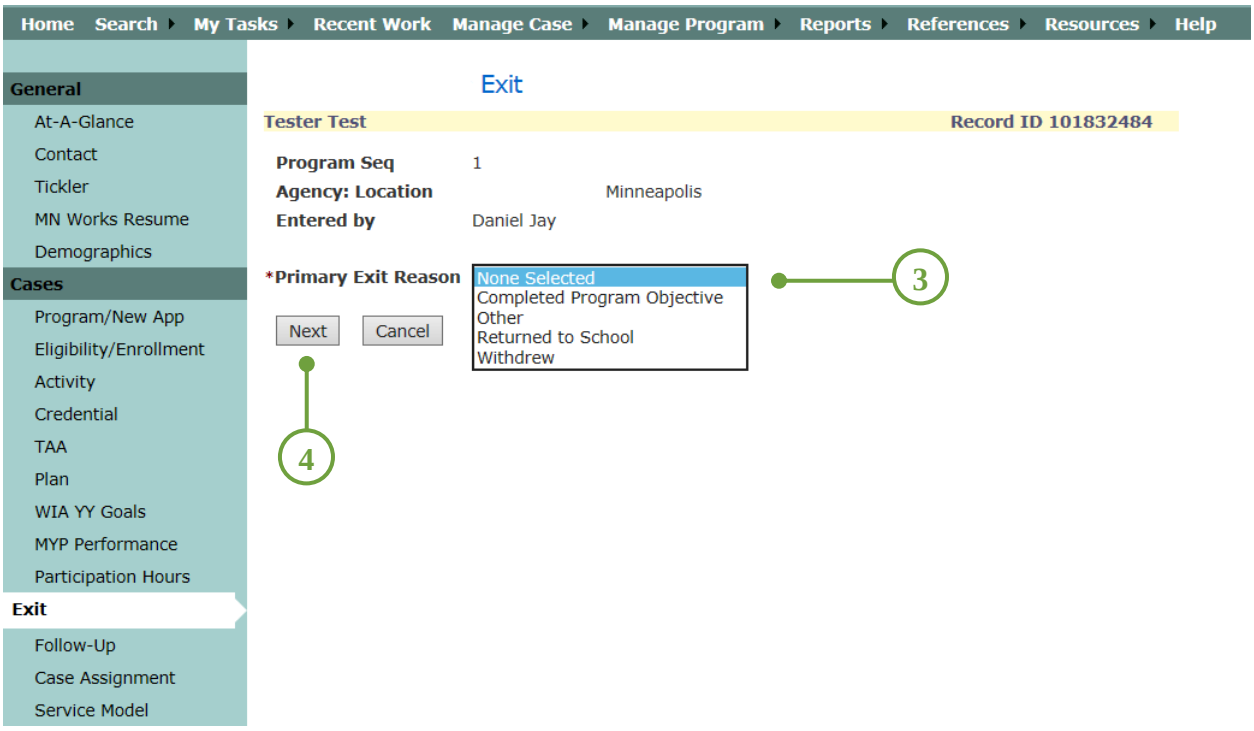
1. WF1 only allows a program to have one outcome. If you have more than one Activity open, you must close all but one before proceeding.
2. Go to **Cases > Exit**. Click the "Exit Program Sequence" at the bottom of the Enrolled field.



3. Select the field that indicated why the participant exited the program from the *Primary Exit Reason* dropdown.

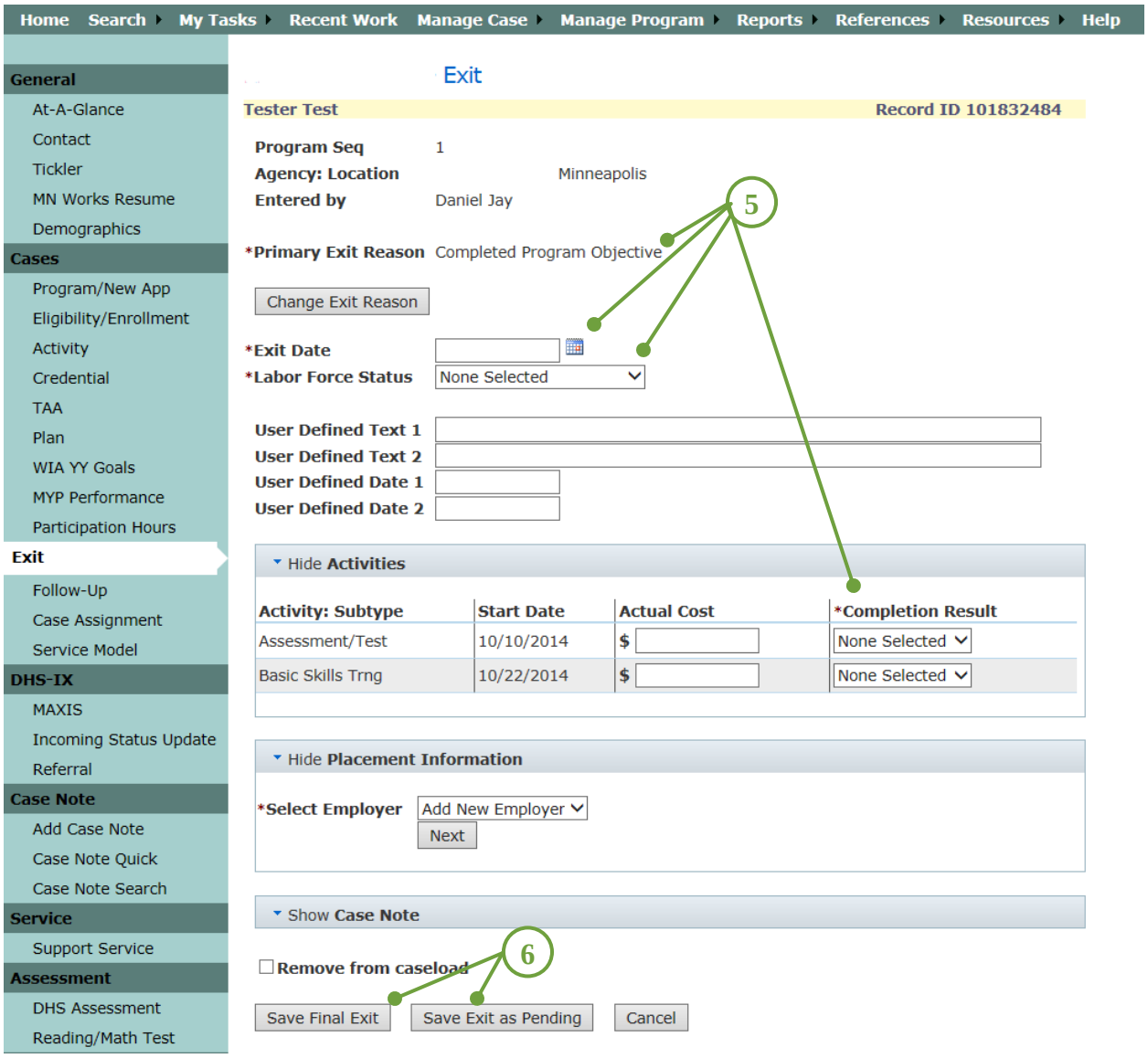
- Completed Program Objective: The participant completed the program's objectives and is now ready to exit/stop receiving services.
- Returned to School: The participant left the program to pursue additional education/certification.
- Withdrew: The participant no longer wishes to participate in services and withdraws.
- Other: Any other reason why the participant ends their participation in a service.

4. Click the **Next** button.



5. After clicking **Next**, some Placement Information section fields become required if the *Primary Exit Reason* involves having completed the program satisfactorily.

6. After the required Placement Information fields are filled in, click either **Save Final Exit**, if you are complete, OR, click **Save Exit as Pending**, if you are not finished filling out the required information.


Home
Search
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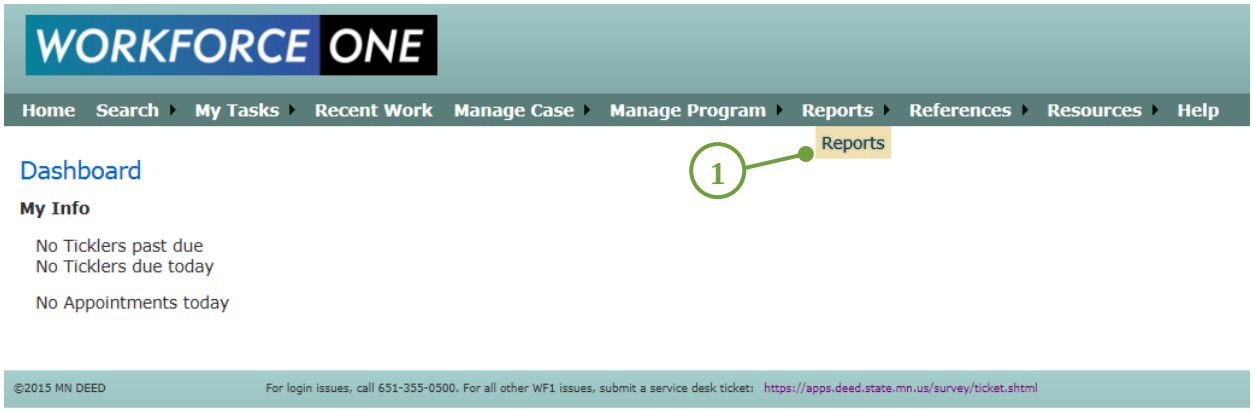
Recent Work
Manage Case
Manage Program
Reports
References
Resources
Help
General
At-A-Glance
Contact
Tickler
MN Works Resume
Demographics
Cases
Program/New App
Eligibility/Enrollment
Activity
Credential
TAA
Plan
WIA YY Goals
MYP Performance
Participation Hours
Exit
Follow-Up
Case Assignment
Service Model
DHS-IX
MAXIS
Incoming Status Update
Referral
Case Note
Add Case Note
Case Note Quick
Case Note Search
Service
Support Service
Assessment
DHS Assessment
Reading/Math Test
Exit
Tester Test
Record ID 101832484
Program Seq 1
Agency: Location Minneapolis
Entered by Daniel Jay
*Primary Exit Reason Completed Program Objective
Change Exit Reason
*Exit Date
*Labor Force Status None Selected
User Defined Text 1
User Defined Text 2
User Defined Date 1
User Defined Date 2
Hide Activities
Activity: Subtype
Start Date
Actual Cost
*Completion Result
Assessment/Test 10/10/2014 $ None Selected
Basic Skills Trng 10/22/2014 $ None Selected
Hide Placement Information
*Select Employer Add New Employer
Next
Show Case Note
Remove from caseload
Save Final Exit
Save Exit as Pending
Cancel
5
6

RUNNING REPORTS

WF1 has a report feature that allows you to see how your agency is doing. The data that you enter into WF1 will ultimately be used for United Way reporting. Standardized reports are provided in the Report Selection List so that you can pull summary information about your program's activity and outcomes.

Run Reports

1. Click on **Reports** from the Home Menu.


WORKFORCE ONE
Home Search My Tasks Recent Work Manage Case Manage Program Reports References Resources Help
Reports
1
Dashboard
My Info
No Ticklers past due
No Ticklers due today
No Appointments today
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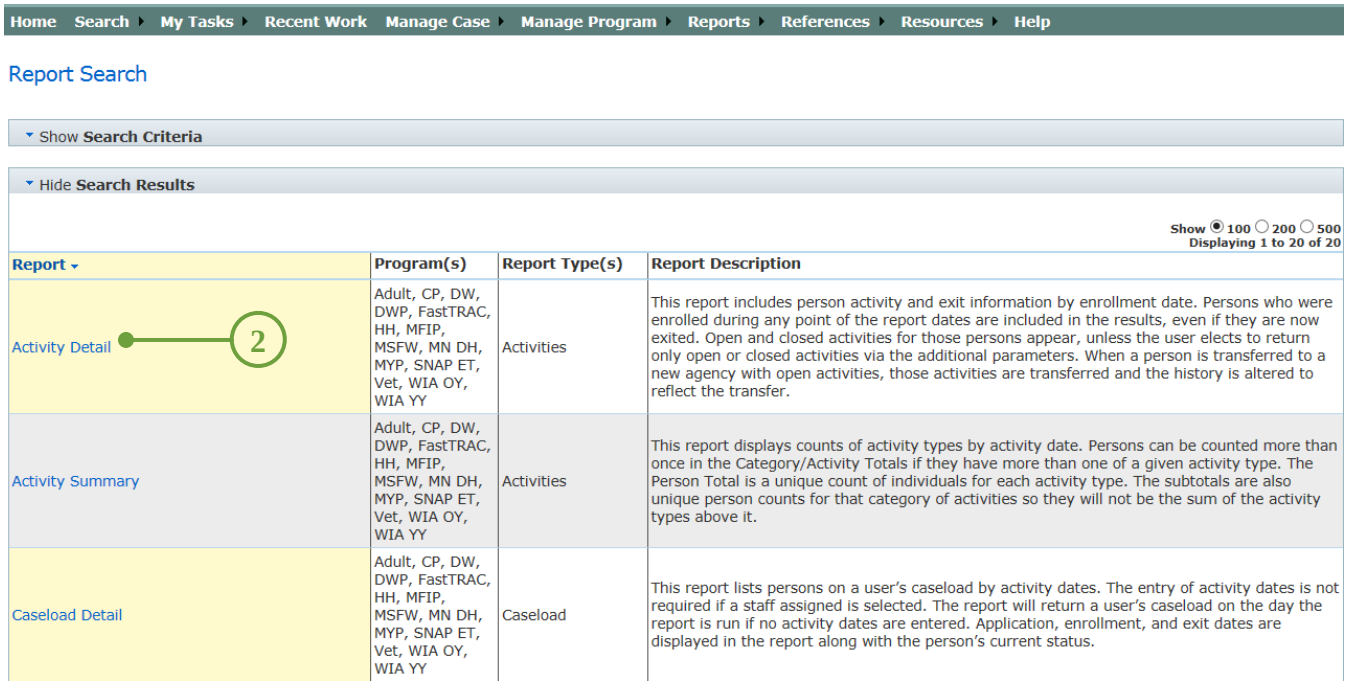
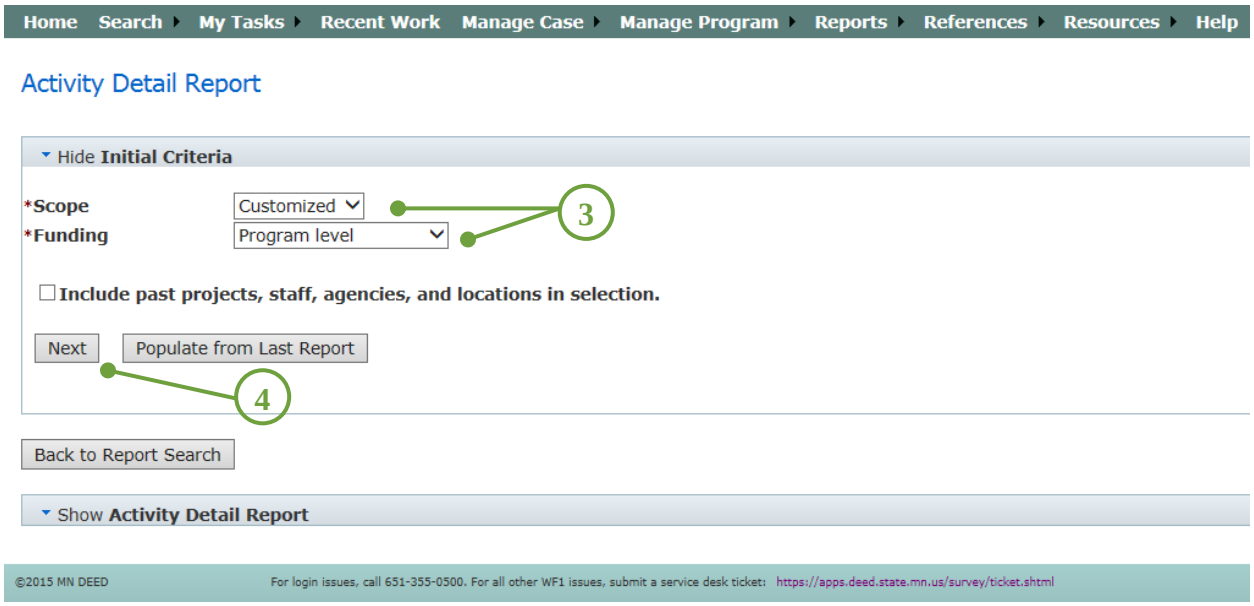
2. Click on a report link.


Home Search My Tasks Recent Work Manage Case Manage Program Reports References Resources Help
Report Search
Show Search Criteria
Hide Search Results
Show 100 200 500
Displaying 1 to 20 of 20
2

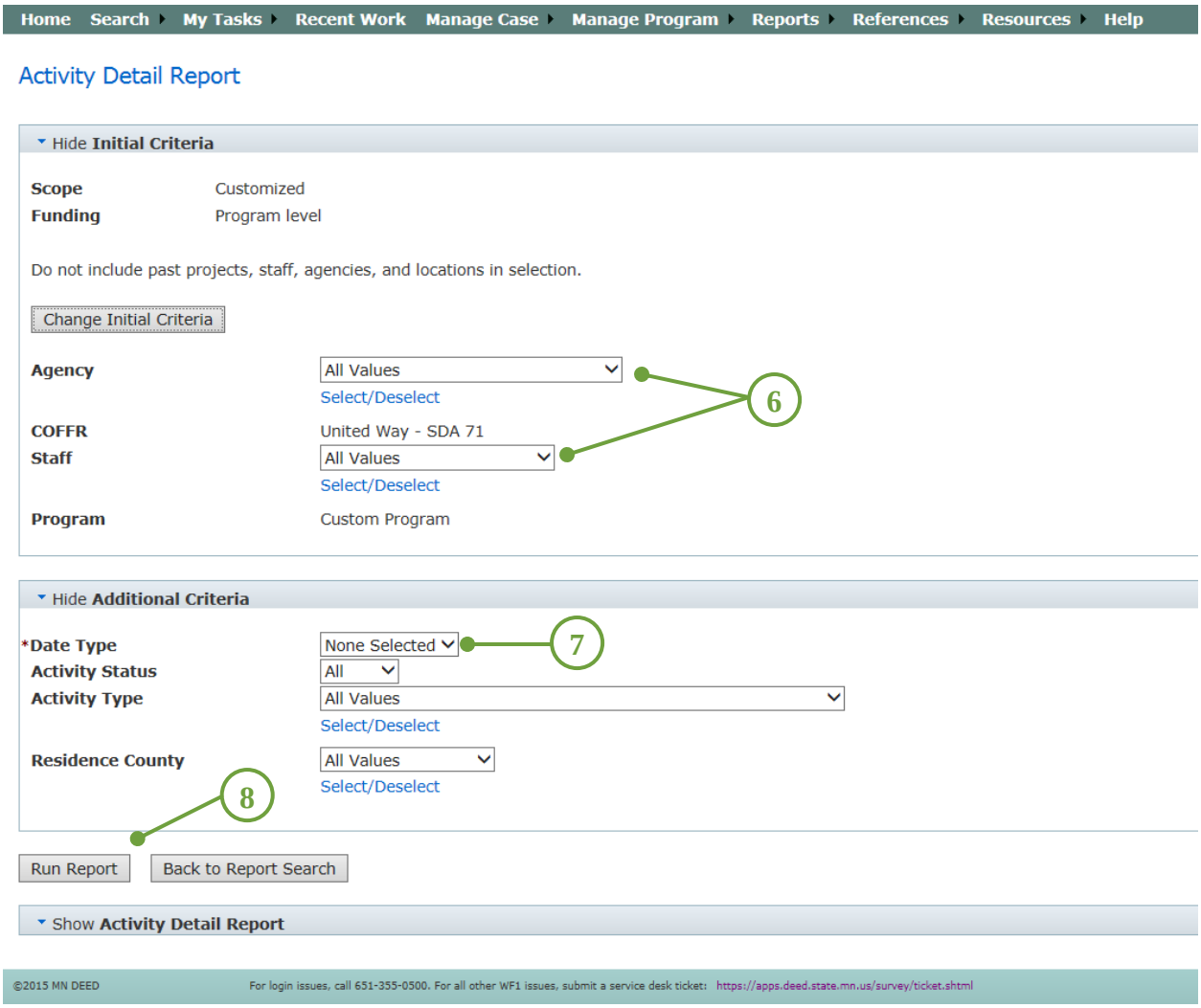
Report	Program(s)	Report Type(s)	Report Description
Activity Detail	Adult, CP, DW, DWP, FastTRAC, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, Vet, WIA OY, WIA YY	Activities	This report includes person activity and exit information by enrollment date. Persons who were enrolled during any point of the report dates are included in the results, even if they are now exited. Open and closed activities for those persons appear, unless the user elects to return only open or closed activities via the additional parameters. When a person is transferred to a new agency with open activities, those activities are transferred and the history is altered to reflect the transfer.
Activity Summary	Adult, CP, DW, DWP, FastTRAC, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, Vet, WIA OY, WIA YY	Activities	This report displays counts of activity types by activity date. Persons can be counted more than once in the Category/Activity Totals if they have more than one of a given activity type. The Person Total is a unique count of individuals for each activity type. The subtotals are also unique person counts for that category of activities so they will not be the sum of the activity types above it.
Caseload Detail	Adult, CP, DW, DWP, FastTRAC, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, Vet, WIA OY, WIA YY	Caseload	This report lists persons on a user's caseload by activity dates. The entry of activity dates is not required if a staff assigned is selected. The report will return a user's caseload on the day the report is run if no activity dates are entered. Application, enrollment, and exit dates are displayed in the report along with the person's current status.

3. Choose appropriate field from the *Scope* and *Funding* drop down menu.
4. Click **Next.**



5.
©2015 MN DEED
For login issues, call 651-355-0500. For all other WF1 issues, submit a service desk ticket: https://apps.deed.state.mn.us/survey/ticket.shtml

6. Select the view or level of detail: agency and staff. Depending on your level of access to WF1, the drop-down choices may vary.
7. *Date Type* field in the drop down menu is required in order to run the report.



8. Click on **Run Report**.

GLOSSARY

Activity Status Definitions

- 12 Month Retention
  The point at which program participants demonstrate 12 months of continuous employment/continue to be employed 365 days post-placement. Twelve-month job retention is reflective of the job placements that occur a full year prior to reporting year.

- 6 Month Retention
  The point at which program participants demonstrate 6 months of continuous employment/continue to be employed 180 days post-placement.

- Actual Family Size
  Enter the number of persons related by blood, marriage or adoption living in a single residence whose income must be counted for program eligibility

- Assessment/Testing
  An evaluation of the participant's capabilities, needs, and vocational potential. This includes assessment to identify skills, career interests, goals, eligibility/fit for program, and barriers.

- Basic Skills Training
  Program is provided for students who need goal-specific elementary- or secondary level basic skills such as work-related math, functional literacy, reading, or writing assistance. (Definition from Minnesota LINCS > Minnesota Adult Basic Education)

- Financial Education Services
  Classes or workshops that provide participants with the skills and knowledge they need to make informed and effective financial decisions. This includes two hours of financial coaching, increase in a participant's knowledge of financial education via pre/post-test, and helping them implement a savings/spending plan.

- Individual Plan Development
  Counselors must determine the length of training by an accurate assessment of the job difficulty, the participant's skill and education, previous work experience, and discussions with the proposed employer.

- Job Placement
  The point at which individuals enter unsubsidized employment in a competitive placement as a result of participating in the program during the reporting year (typically this is a calendar year).

- Occupational Skills Training
  An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain

occupational fields at entry, intermediate, or advanced levels. (Social Policy Research Associates & Public/Private Ventures)

- Paid Work Experience
  Participants' engagement in temporary or transitional employment to gain basic work readiness, maturity, competency and skills (e.g. paid internships, supported work, temporary staffing).

- Placement Services
  Services leading to a job placement including job search and placement assistance, counseling, testing, background checks, working with the employer and job seeker, workshops, resume-building, and interview preparation.

- Support Services
  Childcare, clothes, drug and alcohol counseling, emergency financial assistance, family involvement, healthcare, needs related payment, personal counseling, temporary shelter, transportation, and other services.

- Sectoral Employment Initiative
  Only enter this activity if your agency is a part of the Phillips Sectoral Employment Initiative funded by the Phillips Family Foundation. The program supports industry-focused training and placement programs at nonprofit organizations in the Twin Cities metro area.

Frequently Asked Questions

1. Is it possible, in the WF1 database, to have more than one outcome for the program activities?

   No. This is why United Way requires that certain fields of key data be entered into the "Activities" section of WF1. You are ready to create an outcome only after 12 month retention has been attained.

2. How do we track if a client gets fired and comes back to the program?

   Since you do not have to exit people until they have been employed for 12 months, you will enter job placement as an activity. You can create as many "job placement" activities as you need. If you have already exited a person by completing their outcome, and they come back into your program, you can click the **Re-open Prog Seq** or "re-open program sequence" button next to their name on the summary screen to begin working in their record again.

3. Upon WF1 entry, if a participant is found to be currently receiving services with another United Way grantee, what should happen?

   United Way recommends that agencies follow their normal protocol for dealing with participants that are receiving services with another United Way grantee. For example, you could have a client sign a consent form to follow up with another agency.

4. If one participant ends up with multiple placements while enrolled in the program, which one do we enter as the Job Placement outcome/exit them from a program?

   If a participant has multiple placements, open a new activity status for each placement. Under the activities section, you should be able to open multiple activities under the category of "Job Placement." You can enter an outcome once the individual is ready to completely exit the program.

5. Some participants move from one sub-program to another (gaining new skills, identifying new opportunities, etc.); when should they be recognized as exiting from the program/WF1?

   When a participant no longer receives services from a program, they can be recognized as having exited the program.

6. What if I tried to transfer a default-assigned caseload to myself, but the closed cases did not transfer? What needs to be done with these closed cases?

   If you know that you will not be working with the closed cases anymore, you do not need to worry about doing anything further with these cases. However, if you need to assign the closed cases to yourself, you can do so through the **History** tab.

7. What if I mistakenly entered a client as having provided wage detail consent when they actually did not? How can I rectify that in their record?

   You can correct a client's preference to provide wage detail by going to the **History** tab in the person's record. You then select **Wage Detail Consent** on the blue line. Select the **Program** link. Under **Actions**, select **Change**.

Appendix

1. Sample Consent Form – pg. 48

Attached you will find a *template* to obtain an individual's Consent to Release Information should your agency need one. *As a reminder, consent from each individual participant to allow DEED to release his/her de-identified information to GTCUW (for the ROI project) must be obtained and kept on file at your agency (DEED is legally able to audit each agency to ensure that this consent is being obtained).* A few other reminders about consent:

- The GTCUW funding agreement for the current multi-year grant stipulates the use of WF1 for storing participant information. Each participant whose receipt of services is being provided in part through GTCUW funds ***must*** have a client record entered into the GTCUW application of WF1, regardless of consent to participate in the ROI study. If a client does not want their data entered, it is up to your own agency policy to determine whether the client can be served through your program.

- *To mark whether a client has consented* to his/her data being used in the ROI study, use the "Person has given consent to obtain Wage Detail" field on the intake page in WF1 (note, there is also an "effective date" underneath the field that you will need to complete). DEED knows to use this field to find consenting individuals.

- If a client *does not want their information used in the ROI project*, use the aforementioned field to note this. We are working internally to develop a sample/template to use with clients who do not want their information used in the ROI project; this form just provides some basic information about the client's data being entered into a statewide database. The forthcoming form will largely need to be completed by your own agency (we highly recommend having your own legal counsel make sure that the form adequately protects your agency) and is not legally required by either DEED or GTCUW; it is only meant to provide some legal protection for your agency and transparency to your clients.

- All previous consent obtained through the ROI project is still valid.

2. Sample Information entry form – pg. 49

This form is *not required* by GTCUW; it is provided only as a template if agencies would like to let *non-consenting* participants (for the ROI project) know up front that their information will be entered into the State's WF1 Database.

SAMPLE CONSENT FORM FOR INDIVIDUAL RELEASE OF INFORMATION

The program in which you are enrolled at *[name of agency]* is funded, in part, by Greater Twin Cities United Way. Greater Twin Cities United Way, in partnership with the MN Department of Employment and Economic Development (DEED), is creating a way for *[name of agency]* staff to track your success and the success of the program. We would like your permission to collect from and share with DEED and Greater Twin Cities United Way certain personal information about you. However, you are under no obligation to give this permission.

By granting your permission below, you will be giving *[name of agency]* permission to collect and share your personal information with DEED. Your information will then be stripped of any identifying detail before being provided to Greater Twin Cities United Way. DEED and Greater Twin Cities United Way will use this information in order to track your employment status and wages without having to reach you directly – minimizing the time and effort required by you and them. Greater Twin Cities United Way will also use this information to evaluate the success of the program in which you are enrolled.

What personal information will be shared with DEED and Greater Twin Cities United Way?
By signing below, you authorize *[name of agency]* to collect and share the following personal information with DEED and Greater Twin Cities United Way. Elements marked with an * will not be given to Greater Twin Cities United Way.

- Name*
- Social security number*
- Date of birth
- Gender
- Ethnicity
- Race
- Employment status
- Wages or salary
- Public assistance
- Felony conviction (in the last 7 years)

How will this information be used?
This information will be used by *[name of agency]* and Greater Twin Cities United Way for the purpose of tracking your employment status, wage or salary information, and evaluating the success of the program in which you are enrolled.

How long will the information be shared?
Greater Twin Cities United Way and DEED may use your personal information to track your employment status and wages or salary information for up to three years.

Do I have to give my consent to share my information?
No; you will not be denied services or treated differently if you choose not to give permission to *[name of agency]* to collect and share your personal information. You may be contacted from time to time by *[name of agency]* program staff to ask about your employment status and wages or salary information.

Thank you for your cooperation.

I authorize *[name of agency]* to collect and release my information listed above to Greater Twin Cities United Way (in de-identified formats only) and MN Department of Employment and Economic Development for the purpose of reviewing my employment status, wage or salary information, and evaluating the success of the program in which I am enrolled. I agree that I am under no obligation to grant such permission and that I am signing this release voluntarily.

Name of Client: _____ Date: _____

Signature of Client: _____

SAMPLE INFORMATION ENTRY FORM**

[Name of agency] receives financial support from Greater Twin Cities United Way to run the *[name of program]* program in which you are enrolled. As part of our funding, we are required to enter program participant information into the State of Minnesota's employment and training data system in order to report on the success of our program.

Why?

- So we know how many people we serve and the types of people we serve at our agency.
- To track the success of the program you are enrolled in.
- So we all understand what people need and can plan services to meet these needs.

What information is collected?

- Name
- Social Security Number
- Date of Birth
- Gender
- Ethnicity
- Race
- Employment Status
- Wages or Salary
- Public Assistance
- Felony Conviction (in past 7 years)

Who can see information that is in the State's employment and training data system?

- People who work for this agency will use it to help provide services to you or your family.
- Auditors who have legal rights to review the work of this agency.
- Funds, including Greater Twin Cities United Way, can review program summary data (your data will be made anonymous and summarized with all other program participants)
- Others when we are required by law, including officials with a valid subpoena, warrant, or court order.

We will not release your data for any other use unless you give us your written permission.

Do I have to give my consent to share my information?

[This is program/organization specific. Please consult your legal counsel to determine the appropriate language for this section.]

I have been informed about the collection and entry of my information into the State of Minnesota's employment and training data system. *[if applicable, can use the following: My signature shows that I permit you to enter my personal information into the State's data system.]*

***Please see explanation of this form on p. 42 before using this form with clients.**